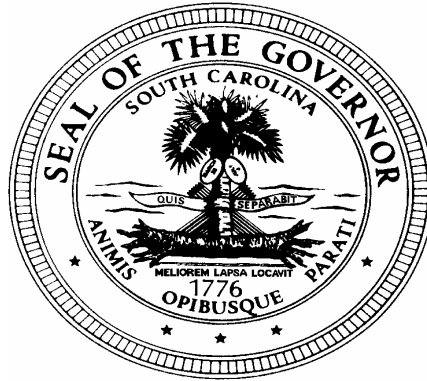


# **STATE OF SOUTH CAROLINA LOW-INCOME HOME ENERGY ASSISTANCE PROGRAM**

**2008 STATE PLAN**  
(CFDA 93.568)



**MARK SANFORD  
GOVERNOR**

**GOVERNOR'S OFFICE OF ECONOMIC OPPORTUNITY**  
Ashlie Lancaster, Director

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## INTRODUCTION

The Low-Income Home Energy Assistance Program (LIHEAP) is a federally-funded program designed to assist eligible low-income households in meeting home heating and/or cooling needs. LIHEAP alleviates home energy crises through the provision of energy assistance, energy education, home weatherization, income management counseling, and intervention with energy providers on behalf of low-income households.

Income eligibility for all LIHEAP assistance under this plan will be limited to households whose total monthly gross income does not exceed 150% of the Poverty Income Guidelines published in the Federal Register by the U.S. Department of Health and Human Services. Allocation of funds is based upon the low-income households in each county as compared to the state's total poverty population; 2000 U.S. Census data.

The goals of LIHEAP for the 2008 Program Year are fivefold: 1) Expand outreach to previously unserved households (never served and/or not served in the last couple of years – 2006 or 2007), 2) Target energy assistance to eligible households with the highest energy needs and lowest incomes, 3) Increase efficiency of energy usage by applicant households, 4) Identify resources to broaden the reach of LIHEAP funds, and 5) Address inefficient home heating/cooling systems through repair and/or replacement.

LIHEAP, in coordination with the Community Services Block Grant and the Weatherization Assistance Program, will assist individuals in achieving improved self-sufficiency. Through energy counseling and case management, agencies will identify and address the factors contributing to energy-related adversities. Agency initiatives will include the use/collaboration of area-wide resources.

The Low-Income Home Energy Assistance Program (LIHEAP) is authorized by Title XXVI of the Omnibus Budget Reconciliation Act of 1981 (42 U.S.C. Section 8621 et seq.) as amended by the Human Services Reauthorization Act of 1984 (P.L. 98-558), the Human Services Reauthorization Act of 1986 (P.L. 99-425), the Augustus F. Hawkins Human Services Reauthorization Act of 1990 (P.L. 101-501), the National Institutes of Health Revitalization Act of 1993 (P.L. 103-43), the Low-Income Home Energy Amendments of 1994 (P.L. 103-552), the Coats Human Services Reauthorization Act of 1998 (P.L. 105-285), and the Energy Policy Act of 2005 (P.L. 109-58). The Office of Community Services, housed within the Administration for Children and Families (ACF) at the U.S. Department of Health and Human Services, administers the Low-Income Home Energy Assistance Program.

In South Carolina, LIHEAP is administered through the Governor's Office – Office of Economic Opportunity (OEO). LIHEAP programs are administered through a network of fifteen community action agencies that provide LIHEAP Energy Assistance, to eligible low-income households for all 46 counties. The LIHEAP Program Year operates from January 1 through December 31.

### **The following changes will be incorporated into the LIHEAP 2008 Program.**

#### **1. Direct Assistance**

- \*Provide once during the year (If received ECIP or Project Share cannot receive DA.)

- \*Maximum benefit \$240

- \*Agencies may require budget counseling or case management services as a condition of assistance for high energy users with the lowest incomes.

## **INTRODUCTION**

### **2. Emergency Crisis Intervention Program (ECIP)**

- \*Provide once during the program year (If client has already received DA or Project Share cannot receive ECIP)
- \*Maximum benefit \$500
- \*As funds are available, where need is determined, to sustain the winter cold or summer heat, home heating/cooling systems may be repaired or replaced up to a maximum of \$3500
- \*Assistance cannot exceed total amount of energy bill
- \*Utility payments under ECIP are not to be rounded. Payments are to reflect the actual amount of the bill.

### **3. Vendor Agreements**

Vendor Agreement (Appendix J) has been revised to capture the most recent vendor information in order that, after 2007, the annual requirement for obtaining this information will only apply to new vendors and on occasions when there are revisions to existing Vendor Agreements. New and existing Vendor Agreements must be available for review upon request during each monitoring visit.

**South Carolina Community Action Agencies and Designated County Service Areas:  
PY 2008 Projected Allocation\***

<b>Aiken-Barnwell Counties Community Action Commission, Inc.</b> Aiken, Barnwell, and Lexington Counties		<b>\$858,903</b>
<b>Beaufort-Jasper Economic Opportunity Commission, Inc.</b> Beaufort and Jasper Counties		<b>\$318,791</b>
<b>Berkeley-Dorchester Counties Economic Development Corporation</b> Berkeley and Dorchester Counties		<b>\$495,691</b>
<b>Carolina Community Actions, Inc.</b> Chester, Fairfield, Lancaster, Union, and York Counties		<b>\$740,091</b>
<b>Charleston County Human Services</b> Charleston County		<b>\$971,328</b>
<b>Chesterfield-Marlboro Economic Opportunity Council, Inc.</b> Chesterfield and Marlboro Counties		<b>\$284,391</b>
<b>Darlington County Community Action Agency</b> Darlington County		<b>\$264,367</b>
<b>GLEAMNS Human Resources Commission, Inc.</b> Abbeville, Edgefield, Greenwood, Laurens, McCormick, Newberry and Saluda Counties		<b>\$710,469</b>
<b>Lowcountry Community Action Agency, Inc.</b> Colleton and Hampton Counties		<b>\$242,018</b>
<b>OCAB Community Action Agency</b> Allendale, Bamberg, Calhoun, and Orangeburg Counties		<b>\$574,098</b>
<b>Pee Dee Community Action Agency</b> Dillon, Florence, and Marion Counties		<b>\$698,840</b>
<b>Piedmont Community Actions, Inc.</b> Cherokee and Spartanburg Counties		<b>\$739,776</b>
<b>Sunbelt Human Advancement Resources, Inc.</b> Anderson, Greenville, Oconee, and Pickens Counties		<b>\$1,570,207</b>
<b>Waccamaw Economic Opportunity Council, Inc.</b> Horry, Georgetown, and Williamsburg Counties		<b>\$848,447</b>
<b>Wateree Community Actions, Inc.</b> Clarendon, Kershaw, Lee, Sumter, and Richland Counties		<b>\$1,470,454</b>

**\*Based upon PY 2007 Actual Initial Base Award**

**PROJECTED LIHEAP BLOCK GRANT  
JANUARY 1, 2008 – DECEMBER 31, 2008  
(CFDA 93.568, G-08 B1SCLIEA)**

<b>Agency</b>	<b>County</b>	<b>Admin.</b>	<b>Energy Counseling</b>	<b>Energy Assistance</b>	<b>Subtotals</b>	<b>Agency Totals</b>
Aiken- Barnwell Counties CAC	Aiken	28,376	23,647	331,057	383,080	
	Barnwell	7,051	5,876	82,258	95,185	
	Lexington	28,195	23,496	328,947	380,638	
	<b>Totals</b>	<b>\$63,622</b>	<b>\$53,019</b>	<b>\$742,262</b>		<b>\$858,903</b>
Beaufort- Jasper EOC	Beaufort	17,786	14,821	207,500	240,107	
	Jasper	5,829	4,857	67,998	78,684	
	<b>Totals</b>	<b>\$23,615</b>	<b>\$19,678</b>	<b>\$275,498</b>		<b>\$318,791</b>
Berkeley- Dorchester Counties EDC	Berkeley	23,433	19,528	273,388	316,349	
	Dorchester	13,285	11,070	154,987	179,342	
	<b>Totals</b>	<b>\$36,718</b>	<b>\$30,598</b>	<b>\$428,375</b>		<b>\$495,691</b>
Carolina CA	Chester	7,522	6,268	87,754	101,544	
	Fairfield	6,590	5,491	76,881	88,962	
	Lancaster	11,084	9,236	129,309	149,629	
	Union	6,170	5,141	71,980	83,291	
	York	23,457	19,547	273,661	316,665	
	<b>Totals</b>	<b>\$54,823</b>	<b>\$45,683</b>	<b>\$639,585</b>		<b>\$740,091</b>
Charleston County HSC	Charleston	71,945	59,954	839,429		
	<b>Totals</b>	<b>\$71,945</b>	<b>\$59,954</b>	<b>\$839,429</b>		<b>\$971,328</b>
Chesterfield- Marlboro EOC	Chesterfield	12,487	10,406	145,679	168,572	
	Marlboro	8,579	7,149	100,091	115,819	
	<b>Totals</b>	<b>\$21,066</b>	<b>\$17,555</b>	<b>\$245,770</b>		<b>\$284,391</b>
Darlington County CAA	Darlington	19,583	16,319	228,465	264,367	
	<b>Totals</b>	<b>\$19,583</b>	<b>\$16,319</b>	<b>\$228,465</b>		<b>\$264,367</b>
GLEAMNS HRC	Abbeville	5,083	4,236	59,303	68,622	
	Edgefield	4,969	4,141	57,975	67,085	
	Greenwood	13,244	11,036	154,510	178,790	
	Laurens	14,072	11,727	164,176	189,975	
	McCormick	2,232	1,860	25,970	30,062	
	Newberry	8,728	7,273	101,827	117,828	
	Saluda	4,304	3,587	50,216	58,107	
	<b>Totals</b>	<b>\$52,632</b>	<b>\$43,860</b>	<b>\$613,977</b>		<b>\$710,469</b>
Lowcountry CAA	Colleton	11,689	9,741	136,371	157,801	
	Hampton	6,238	5,199	72,780	84,217	
	<b>Totals</b>	<b>\$17,927</b>	<b>\$14,940</b>	<b>\$209,151</b>		<b>\$242,018</b>

**PROJECTED LIHEAP BLOCK GRANT  
JANUARY 1, 2008 – DECEMBER 31, 2008  
(CFDA 93.568, G-08B1SCLIEA)**

<b>Agency</b>	<b>County</b>	<b>Admin.</b>	<b>Energy Counseling</b>	<b>Energy Assistance</b>	<b>Subtotals</b>	<b>Agency Totals</b>
OCAB CAA	Allendale	5,055	4,213	58,979	68,247	
	Bamberg	6,422	5,352	74,924	86,698	
	Calhoun	3,557	2,965	41,503	48,025	
	Orangeburg	27,491	22,909	320,728	371,128	
	<b>Totals</b>	<b>\$42,525</b>	<b>\$35,439</b>	<b>\$496,134</b>		<b>\$574,098</b>
Pee Dee CAA	Dillon	10,664	8,886	124,408	143,958	
	Florence	29,263	24,386	341,404	395,053	
	Marion	11,839	9,866	138,124	159,829	
	<b>Totals</b>	<b>\$51,766</b>	<b>\$43,138</b>	<b>\$603,936</b>		<b>\$698,840</b>
Piedmont Community Actions, Inc.	Cherokee	10,467	8,722	122,111	141,300	
	Spartanburg	44,331	36,943	517,202	598,476	
	<b>Totals</b>	<b>\$54,798</b>	<b>\$45,665</b>	<b>\$639,313</b>		<b>\$739,776</b>
SHARE, Inc.	Anderson	28,645	23,871	334,188	386,704	
	Greenville	56,629	47,191	660,668	764,488	
	Oconee	10,319	8,599	120,392	139,310	
	Pickens	20,719	17,266	241,720	279,705	
	<b>Totals</b>	<b>\$116,312</b>	<b>\$96,927</b>	<b>\$1,356,968</b>		<b>\$1,570,207</b>
Waccamaw EOC	Georgetown	13,766	11,473	160,619	185,858	
	Horry	34,066	28,389	397,439	459,894	
	Williamsburg	15,014	12,512	175,169	202,695	
	<b>Totals</b>	<b>\$62,846</b>	<b>\$52,374</b>	<b>\$733,227</b>		<b>\$848,447</b>
Wateree Community Actions	Clarendon	10,449	8,708	121,907	141,064	
	Kershaw	9,726	8,105	113,466	131,297	
	Lee	5,847	4,873	68,219	78,939	
	Richland	58,905	49,087	687,231	795,223	
	Sumter	23,995	19,996	279,940	323,931	
	<b>Totals</b>	<b>\$108,922</b>	<b>\$90,769</b>	<b>\$1,270,763</b>		<b>\$1,470,454</b>
<b>GRAND TOTALS</b>		<b>\$799,100</b>	<b>\$665,918</b>	<b>\$9,322,853</b>		<b>\$10,787,871</b>



## PROJECTED SYNOPSIS FOR 2008 FUNDING

Description		2008 Projected Allocation
a)	OEO Administration 4%	\$ 532,734
b)	Subgrantee Administration 6%	\$ 799,100
c)	Subgrantee Energy Counseling 5%	\$ 665,918
d)	Subgrantee Energy Assistance	\$9,322,853
e)	LIHEAP Weatherization 15%	\$1,997,754
f)	<b>Total Projected Award</b>	<b>\$13,318,359</b>

**Administrative Costs** - Costs necessary for the proper administration of LIHEAP. For more information, refer to LIHEAP IM2000-12, LIHEAP Costs for Planning and Administration, [www.acf.dhhs.gov/programs/liheap/guidance/special\\_topics/im00-12.html](http://www.acf.dhhs.gov/programs/liheap/guidance/special_topics/im00-12.html). Administrative costs include:

- General administration and coordination.
- Salaries and benefits of staff performing administrative and program activities.
- Preparation of program plan and budgets.
- Program monitoring.
- Fraud and abuse units.
- Procurement.
- Technical assistance and training.
- Services related to financial management systems and internal controls, litigation, audits, property management and personnel.
- Supplies, equipment, travel, postage, utilities, and office space for program administration.
- Travel costs for official business and not excluded as a direct program administrative cost for providing program services.
- Management information systems not related to the tracking and monitoring of TANF requirements (e.g., for a personnel or payroll system for State staff).
- Preparing reports and other documents.

### **Subgrantee Energy Counseling – 5%**

Based on guidance (IM2000-12) from the U.S. Department of Health and Human Services (USDHHS), we are authorized to utilize the definitions of administrative and non-administrative costs observed by the Temporary Assistance to Needy Families (TANF) Program. With the TANF definition, a number of LIHEAP functions that are recognized as administrative may be charged as non-administrative costs under Energy Counseling Support. Costs associated with salaries for activities related to energy counseling (non-administrative) may be charged under Energy Counseling Support. Subgrantees must determine the percentage of time an intake worker spends on energy counseling services and the percentage time on eligibility. The percentage of time for energy counseling can be budgeted under the Energy Counseling Support Component and the percent of eligibility must remain in LIHEAP Administrative costs.

## PROJECTED SYNOPSIS FOR 2008 FUNDING

Energy Counseling funds may also be used to:

- Procure energy conservation educational materials.
- Contract with vendors to conduct workshops on methods for reducing home energy usage and costs.
- Provide budget counseling for applicants with the lowest incomes and highest energy burdens.
- Case manage applicants toward improved self-sufficiency.

### **Energy Assistance Funds**

The Energy Assistance funds are the total funds available for distribution to eligible households. Assistance is given based on need and is subject to the availability of Federal funds. All applicant households will be determined eligible according to the program procedures and income guidelines. There are two components of Energy Assistance: Direct Assistance Heating or Direct Assistance Cooling and Emergency Crisis Intervention (ECIP).

A crisis exists when extreme weather conditions, fuel supply shortages or increases in home energy costs have depleted or threatened to deplete household financial resources creating an energy burden that poses a health and/or safety threat to the well-being of the household; particularly households with elderly, disabled and those with children age 5 or younger.

A utility termination alone does not necessarily constitute a crisis.

### **LIHEAP Weatherization Funds**

The State of South Carolina allocates 15% of LIHEAP funds for Weatherization to supplement the PY 2008 Weatherization Assistance Program, funded by the U.S. Department of Energy. The South Carolina Governor's Office – Office of Economic Opportunity administers the state's Weatherization Program. Services are provided by a network of nine Community Action Agencies in all 46 counties. Typical weatherization services include: air sealing, attic and wall insulation, replacing incandescent light bulbs with compact fluorescent light bulbs, installing storm windows, refrigerator replacement, and insulating ducts.

### **Project Share**

The Office of Economic Opportunity also distributes funding from four (4) utilities in South Carolina through Project Share; a program consisting of subscriber and corporate contributions from Progress Energy's Energy Neighbor Fund, Duke Power's Fan Relief Fund, South Carolina Electric and Gas (SCE&G) Project Share Program and Piedmont Natural Gas' Share the Warmth Program. Project Share funds supplement the Low-Income Home Energy Assistance Program. For more information about the South Carolina Low-Income Home Energy Assistance Program, visit: [www.oepp.sc.gov/oeo/](http://www.oepp.sc.gov/oeo/).

**LOW INCOME HOME ENERGY ASSISTANCE BLOCK GRANT PROGRAM  
DETAILED MODEL PLAN  
PUBLIC LAW 97-35, AS AMENDED  
CFDA 93.568  
PROGRAM YEAR**

**GRANTEE: SOUTH CAROLINA GOVERNOR'S OFFICE OF ECONOMIC OPPORTUNITY  
FFY 2008**

**EIN: 1-576000286- A1**

**DUNS: 136386591**

**ADDRESS: 1205 Pendleton Street  
Edgar A. Brown Building  
Columbia, South Carolina 29201**

**NAME OF LIHEAP COORDINATOR: Rosalie Smith**

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**TELEPHONE: (803) 734-0672 FAX: (803) 734-0356**

**LAST DETAILED MODEL PLAN FILED PY 2007**

**PLEASE CHECK ONE: TRIBE \_\_\_\_\_ STATE X INSULAR AREA \_\_\_\_\_**

**Department of Health and Human Services  
Administration for Children and Families  
Office of Community Services  
Washington, DC 20447**

**August 1987, revised 05/92, 02/95, 03/96, 12/98, 11/01**

**OMB Approval No. 0970-0075**

**Expiration Date: 10/31/**

**THE PAPERWORK REDUCTION ACT OF 1995 (Pub. L. 104-13)**

Use of this model plan is optional. However, the information requested is required in order to receive a Low Income Home Energy Assistance Program (LIHEAP) grant in years in which the grantee is not permitted to file an abbreviated plan. Public reporting burden for this collection of information is estimated to average 1 hour per response, including the time for reviewing instructions, gathering and maintaining the data needed, and reviewing the collection of information. An agency may not conduct or sponsor, and a person is not required to respond to, a collection of information unless it displays a currently valid OMB control number.

**Assurances**

The **Office of the Governor, Office of Economic Opportunity** agrees to:

(1) use the funds available under this title to--

(A) conduct outreach activities and provide assistance to low income households in meeting their home energy costs, particularly those with the lowest incomes that pay a high proportion of household income for home energy, consistent with paragraph (5);

(B) intervene in energy crisis situations;

(C) provide low-cost residential weatherization and other cost-effective energy-related home repair; and

(D) plan, develop, and administer the State's program under this title including leveraging programs,

and the State agrees not to use such funds for any purposes other than those specified in this title;

(2) make payments under this title only with respect to--

(A) households in which one or more individuals are receiving--

(i) assistance under the State program funded under part A of title IV of the Social Security Act;

(ii) supplemental security income payments under title XVI of the Social Security Act;

(iii) food stamps under the Food Stamp Act of 1977; or

(iv) payments under section 415, 521, 541, or 542 of title 38, United States Code, or under section 306 of the Veterans' and Survivors' Pension Improvement Act of 1978; or

(B) households with incomes which do not exceed the greater of an—

(i) amount equal to 150 percent of the poverty level for such State; or

(ii) amount equal to 60 percent of the State median income;

except that a State may not exclude a household from eligibility in a fiscal year solely on the basis of household income if such income is less than 110 percent of the poverty level for such State, but the State may give priority to those households with the highest home energy costs or needs in relation to household income.

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FFY 2008 LIHEAP STATE PLAN

- (3) conduct outreach activities designed to assure that eligible households, especially households with elderly individuals or disabled individuals, or both, and households with high home energy burdens, are made aware of the assistance available under this title, and any similar energy-related assistance available under subtitle B of title VI (relating to Community Services Block Grant program) or under any other provision of law which carries out programs which were administered under the Economic Opportunity Act of 1964 before the date of the enactment of this Act;
- (4) coordinate its activities under this title with similar and related programs administered by the Federal Government and such State, particularly low-income energy-related programs under subtitle B of title VI (relating to Community Services Block Grant program), under the Supplemental Security Income program, under part A of title IV of the Social Security Act, under title XX of the Social Security Act, under the Low-Income Weatherization Assistance Program under title IV of the Energy Conservation and Production Act, or under any other provision of law which carries out programs which were administered under the Economic Opportunity Act of 1964 before the date of the enactment of this Act;
- (5) provide, in a timely manner, that the highest level of assistance will be furnished to those households which have the lowest incomes and the highest energy costs or needs in relation to income, taking into account family size, except that the State may not differentiate in implementing this section between the households described in clauses 2(A) and 2(B) of this subsection;
- (6) to the extent it is necessary to designate local administrative agencies in order to carry out the purposes of this title, to give special consideration, in the designation of such agencies, to any local public or private nonprofit agency which was receiving Federal funds under any low-income energy assistance program or weatherization program under the Economic Opportunity Act of 1964 or any other provision of law on the day before the date of the enactment of this Act, except that—
- (A) the State shall, before giving such special consideration, determine that the agency involved meets program and fiscal requirements established by the State; and
  - (B) if there is no such agency because of any change in the assistance furnished to programs for economically disadvantaged persons, then the State shall give special consideration in the designation of local administrative agencies to any successor agency which is operated in substantially the same manner as the predecessor agency which did receive funds for the fiscal year preceding the fiscal year for which the determination is made;
- (7) if the State chooses to pay home energy suppliers directly, establish procedures to --
- (A) notify each participating household of the amount of assistance paid on its behalf;
  - (B) assure that the home energy supplier will charge the eligible household, in the normal billing process, the difference between the actual cost of the home energy and the amount of the payment made by the State under this title;

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(C) assure that any agreement entered into with a home energy supplier under this paragraph will contain provisions to assure that no household receiving assistance under this title will be treated adversely because of such assistance under applicable provisions of State law or public regulatory requirements; and

(D) ensure that the provision of vendor payments remains at the option of the State in consultation with local grantees and may be contingent on unregulated vendors taking appropriate measures to alleviate the energy burdens of eligible households, including providing for agreements between suppliers and individuals eligible for benefits under this Act that seek to reduce home energy costs, minimize the risks of home energy crisis, and encourage regular payments by individuals receiving financial assistance for home energy costs;

(8) provide assurances that,

(A) the State will not exclude households described in clause (2)(B) of this subsection from receiving home energy assistance benefits under clause (2), and

(B) the State will treat owners and renters equitably under the program assisted under this title;

(9) provide that--

(A) the State may use for planning and administering the use of funds under this title an amount not to exceed 10 percent of the funds payable to such State under this title for a fiscal year; and

(B) the State will pay from non-Federal sources the remaining costs of planning and administering the program assisted under this title and will not use Federal funds for such remaining cost (except for the costs of the activities described in paragraph (16));

(10) provide that such fiscal control and fund accounting procedures will be established as may be necessary to assure the proper disbursement of and accounting for Federal funds paid to the State under this title, including procedures for monitoring the assistance provided under this title, and provide that the State will comply with the provisions of chapter 75 of title 31, United States Code (commonly known as the "Single Audit Act");

(11) permit and cooperate with Federal investigations undertaken in accordance with section 2608;

(12) provide for timely and meaningful public participation in the development of the plan described in subsection (c);

(13) provide an opportunity for a fair administrative hearing to individuals whose claims for assistance under the plan described in subsection (c) are denied or are not acted upon with reasonable promptness; and

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(14) cooperate with the Secretary with respect to data collecting and reporting under section 2610.

(15) \* beginning in fiscal year 1992, provide, in addition to such services as may be offered by State Departments of Public Welfare at the local level, outreach and intake functions for crisis situations and heating and cooling assistance that is administered by additional State and local governmental entities or community-based organizations (such as community action agencies, area agencies on aging and not-for-profit neighborhood-based organizations), and in States where such organizations do not administer functions as of September 30, 1991, preference in awarding grants or contracts for intake services shall be provided to those agencies that administer the low-income weatherization or energy crisis intervention programs.

**\* This assurance is applicable only to States and to territories whose annual regular LIHEAP allotments exceed \$200,000. Neither territories with annual allotments of \$200,000 or less nor Indian tribes/tribal organizations are subject to Assurance 15.**

(16) use up to 5 percent of such funds, at its option, to provide services that encourage and enable households to reduce their home energy needs and thereby the need for energy assistance, including needs assessments, counseling, and assistance with energy vendors, and report to the Secretary concerning the impact of such activities on the number of households served, the level of direct benefits provided to those households, and the number of households that remain unserved.

Certification to the Assurances: As Chief Executive Officer, I agree to comply with the sixteen assurances contained in Title XXVI of the Omnibus Budget Reconciliation Act of 1981, as amended.\* By signing these assurances, I also agree to abide by the standard assurances on lobbying, debarment and suspension, and a drug-free workplace.

Signature of the Tribal or Board Chairperson or Chief Executive Officer of the State or Territory.\*\*

**Signature:** \_\_\_\_\_

**Title:** Director, SC Governor's Office of Economic Opportunity

**Date:** \_\_\_\_\_

**\* Indian tribes/tribal organizations, and territories with annual regular LIHEAP allotments of \$200,000 or less, are not subject to assurance 15, and thus must only certify to 15 assurances.**

**\*\* If a person other than the Chief Executive Officer of the State or territory, or Tribal Chairperson or Board Chairperson of a tribal organization, is signing the certification to the assurances, a letter must be submitted delegating such authority. (PLEASE ATTACH DELEGATION of AUTHORITY.) The delegation must include authority to sign the assurances, not just to administer the program.**

In the above assurances which are quoted from the law, "State" means the 50 States, the District of Columbia, an Indian Tribe or Tribal Organization, or a Territory; "title" of the Act refers to Title XXVI of the Omnibus Budget Reconciliation Act of 1981 (OBRA), as amended, the "Low Income Home Energy Assistance Act"; "section" means Section 2605 of OBRA; and, "subsection" refers to Section 2605(b) of OBRA.

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**LIHEAP  
Statutory  
References**

**2605(a)**

**2605(b)(1)**

**USE OF FUNDS**

**Please check which components you will operate under the LIHEAP program.**

(Note: You must provide information for each component designated here as requested elsewhere in this plan.)

**Dates of Operation**

<u>  X  </u> Heating Assistance	<u>January 1 – April 30</u>
<u>  X  </u> Heating Assistance	<u>October 1 – December 31</u>
<u>  X  </u> Cooling Assistance	<u>May 1 – September 30</u>
<u>  X  </u> Crisis Assistance	<u>January 1 – December 31</u>
<u>  X  </u> Weatherization Assistance	<u>April 1, 2008 – March 31, 2009</u>

**2605(c)(1)(C) LIHEAP funds will be used for each component that you will operate:**

  30%   Heating Assistance

  20%   Cooling Assistance

  20%   Crisis Assistance

**2605(k)(1)**   15%   Weatherization Assistance

       Carryover to the Following Fiscal Year

**2605(b)(9)**   10%   Administrative and Planning

**2605(b)(16)**   5%   Services to Reduce Home Energy Needs,  
Including Needs Assessment (Assurance 16)

       Used to Develop and Implement Leveraging Activities (limited to the greater of 0.08% or \$35,000 for States, the greater of 2% or \$100 for territories, tribes and tribal organizations).

  100%   **TOTAL**



LIHEAP  
Statutory  
References  
2605(c)(1)(C)

**ALTERNATE USE OF CRISIS ASSISTANCE FUNDS**

**The funds reserved for winter crisis assistance that have not been expended by March 15 will be reprogrammed to:**

\_\_\_\_\_ Heating Assistance

\_\_\_ X \_\_\_ Cooling Assistance

\_\_\_\_\_ Weatherization Assistance

\_\_\_\_\_ Other:

Do you accept applications for energy crisis assistance at sites that are geographically accessible to all households in the area to be served? (This is required by the statute.)

Yes \_\_\_ X \_\_\_ No \_\_\_\_\_

2605(b)(2)  
2605(c)(1)(A)

**ELIGIBILITY**

**What are your maximum eligibility limits?**

(Please check the components to which they apply.)

**Current year guidelines must be used.**

\_\_\_ X \_\_\_ 150% of the poverty guidelines:  
heating \_\_\_ X \_\_\_ cooling \_\_\_ X \_\_\_ crisis \_\_\_ X \_\_\_ wx \_\_\_ X \_\_\_

2605(c)(1)(A)  
2605(b)(2)

**ELIGIBILITY**

**Do you have additional eligibility requirements for:**

**HEATING ASSISTANCE** (\_\_\_\_\_ Yes \_\_\_ X \_\_\_ No)

Do you use: Yes No

Assets test? \_\_\_\_\_ X \_\_\_\_\_

Do you give priority in eligibility to:

Elderly \_\_\_ X \_\_\_ \_\_\_\_\_

Disabled \_\_\_ X \_\_\_ \_\_\_\_\_

Young children \_\_\_ X \_\_\_ \_\_\_\_\_

Other: High energy burden \_\_\_ X \_\_\_ \_\_\_\_\_

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**LIHEAP  
Statutory  
References  
2605(c)(1)(A)  
2605(b)(2)**

**ELIGIBILITY**

**Do you have additional eligibility requirements for:**

**COOLING ASSISTANCE** (\_\_\_\_ Yes    **X** No)

Do you use:	<u>Yes</u>	<u>No</u>
Assets test?	_____	<u><b>X</b></u>
Do you give priority in eligibility to:		
Elderly	<u><b>X</b></u>	_____
Disabled	<u><b>X</b></u>	_____
Young children	<u><b>X</b></u>	_____
Other: High energy burden	<u><b>X</b></u>	_____

**LIHEAP  
Statutory  
References  
2604(c)  
2605(c)(1)(A)**

**ELIGIBILITY**

**Do you have additional eligibility requirements for:**

**CRISIS ASSISTANCE** (\_\_\_\_ Yes **X** No)

	<u>Yes</u>	<u>No</u>
<b>Do you use:</b>		
Assets test?	_____	<u><b>X</b></u>
Must the household have received a		
Shut-off notice or have an empty tank?	<u><b>X</b></u>	_____
Must the household have exhausted		
regular benefit?	_____	<u><b>X</b></u>
Must the household have received a		
rent eviction notice?	_____	<u><b>X</b></u>
Must heating/cooling be medically		
necessary?	_____	<u><b>X</b></u>
Other (Please explain):	_____	_____

**What constitutes a crisis?** (Please describe)

- Sudden Reduction in Household Income – Primary wage earner died or became disabled; or lost job.
- Dwelling is burned or damaged by tornado or hurricane.
- Utility Termination Notice.
- Utility has already been turned off.
- Empty fuel tank.
- Medical/health and/or safety necessity to sustain extreme heat/cold.
- Home heating/cooling system inoperable; needs repair/replacement to sustain during extreme temperatures.

**LIHEAP  
Statutory  
References  
2605(c)(1)(A)**

**ELIGIBILITY**

**Do you have additional eligibility requirements for Weatherization?**

(   X   Yes           No)

Do you use:        Yes           No

Assets test?          X  

Priority groups? (Please list)   X         

Elderly, Disabled, Households w/children age 5 and younger, high energy users with lowest incomes, and high energy burden

**Are you using Department of Energy (DOE) Low Income Weatherization Assistance Program (LIWAP) rules to establish eligibility or to establish priority eligibility for households with certain characteristics?**

If yes, are there exceptions?          X         

Please list below. **No exceptions**

**OUTREACH**

**2605(b)(3)**

**Please check the outreach activities that you 2605(c)(3)(A) conduct that are designed to assure that eligible households are made aware of all LIHEAP assistance available:**

  X   provide intake service through home visits or by telephone for the elderly and disabled.

  X   place posters/flyers in local and county social service offices, offices on aging, Social Security offices, VA, etc.

  X   publish articles in newspapers and applicable publications, and broadcast public service announcements.

  X   include inserts in energy vendor billings to inform individuals of the availability of all types of LIHEAP assistance.

  X   conduct mass mailing to previous year LIHEAP recipients.

  X   inform applicants of the availability of LIHEAP assistance during application intake for other low-income programs; e.g. Head Start, CSBG, WAP.

  X   establish interagency agreements with other area agencies to perform outreach to target groups.

  X   other (Please specify): CSBG, Head Start and Weatherization Referrals, and OEO web site.

**LIHEAP  
Statutory  
References  
2605(b)(4)**

**COORDINATION**

**Please describe how you will assure that LIHEAP is coordinated with similar and related programs. The description provided applies to all components unless specifically noted.**

Subgrantees will ensure coordination with other resources within the designated service area to assist with providing other services/funds to households in need. Such coordination, outlined in the agency's Work Plan, details how the Subgrantee will ensure the elimination of the duplication of services. Subgrantees also make referrals within the agency to programs and services that provide educational assistance in helping clients reduce high energy usage and improve income management techniques. CSBG case management and program support components assist with the provision of LIHEAP services.

**DETERMINATION OF BENEFITS AND LEVELS**

**2605(b)(5)  
2605(b)(2)  
2605(b)(8A)**

**The statute requires that there be no difference in the treatment of households eligible because of their income and those eligible because they receive benefits under TANF, Food Stamps, SSI, or certain means-tested veterans programs ("categorically eligible"). How do you ensure there is no difference when determining eligibility and benefit amounts? This applies to all components unless specifically noted below.**

No differentiation is made based on the source(s) of household income. All sources of household income are documented on the Application for Program Services or in SC ROMA and then processed, reviewed and approved by an agency representative.

**HEATING COMPONENT**

**2605(b)(5) Please check the variables you use to determine your benefit levels (check all that apply):**

- ☒ total household income
- ☒ household size
- ☒ total home energy expense
  - ☐ fuel type
  - ☐ climate/region
  - ☒ individual utility bill
  - ☐ dwelling type
  - ☒ energy burden
    - (20% of income spent on home energy)
  - ☒ energy need
  - ☒ other (describe): Disabled Household Member
    - Elderly Household Member
    - Household with Child Age 5 or younger

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**LIHEAP  
Statutory  
References**

**2605(b)(5)**

**2605(c)(1)(B)**

**BENEFIT LEVELS - HEATING**

**Describe how you will assure that the highest benefits go to households with the lowest incomes and the highest energy costs or needs in relation to income, taking into account family size.**

**Please describe benefit levels or attach a copy of your payment matrix.**

**Minimum Assistance** **\$130**

Additional assistance provided if:

(1) Elderly \$ 20

(2) Disabled \$ 20

(3) Total Household Income is 100%  
or less than Poverty Guideline \$ 25

(4) Applicant with children age 5 or younger \$ 20

(5) Energy Burden \$ 25

**Maximum Assistance** **\$240**

**Do you provide in-kind (e.g., blankets, space heaters) and/or other forms of benefits?**

  X   Yes      No If yes, please describe.

Subgrantees have the option to purchase blankets and lap throws for eligible households and throws for the elderly, homebound and disabled. Space heaters are also approved and may be purchased as needed, as funds are available.

**2605(b)(5)**

**2605(c)(1)(B)**

**COOLING COMPONENT**

**Please check the variables you use to determine your benefit levels (check all that apply):**

  X   income

  X   family (household) size

  X   home energy cost or need

     fuel type

     climate/region

  X   individual bill

     dwelling type

  X   energy burden

(20% of income spent on home energy)

     energy need

  X   other: Disabled Household Member

Elderly Household Member

Household with Child Age 5 or younger

**LIHEAP  
Statutory  
References**

**2605(b)(5)  
2605(c)(1)(B)**

**BENEFIT LEVELS - COOLING**

**Describe how you will assure that the highest benefits will go to households with the lowest incomes and the highest energy costs or needs in relation to income, taking into account family size. Please describe benefit levels or attach a copy of your payment matrix.**

**Minimum Assistance** **\$130**

Additional assistance provided if:

- |  |              |
|--|--------------|
| (1) Elderly  | \$ 20        |
| (2) Disabled   | \$ 20        |
| (3) Total Household Income is 100%<br>or less than Poverty Guideline | \$ 25        |
| (4) Applicant with children age 5 or younger                         | \$ 20        |
| (5) Energy Burden  | <u>\$ 25</u> |

**Maximum Assistance** **\$240**

**Do you provide in-kind (e.g. fans) and/or other forms of benefits?**

  X   Yes     No (If yes, please describe.)

Subgrantees utilize other funds to purchase fans. Window a/c units and window heat pump a/c units are also approved for purchase; particularly for vulnerable households during extreme summer temperatures to sustain the health and safety of clients.

**2605(b)(5)  
2605(c)(1)(B)**

**CRISIS COMPONENT**

**How do you handle crisis situations?**

  X   separate component            other (please explain)

**If you have a separate component, how do you determine crisis assistance benefits?**

  X   amount to resolve crisis, up to maximum  
           other (please describe)

**Please indicate the maximum benefit for each type of crisis assistance offered.**

year-round      \$  500  maximum benefit

**Do you provide in-kind (e.g. blankets, space heaters, fans) and/or other forms of benefits?**

  X   Yes     No If yes, please describe.

Under ECIP, during extreme summer heat, as need is determined, a/c units may be purchased and installed and HVAC systems may be repaired/replaced to increase operating efficiency and help households to sustain during the extreme summer temperatures.

\*Space Heaters: Households will be provided a small heater if the only heating source is wood; and or household does not have any other source of heat.

\*Air Conditioners: Households may be provided an air conditioner if the unit is needed to sustain the extreme summer heat; in particular households with members who are elderly, disabled and those with young children.

\*Window Heat Pump A/C Units: May be provided for households particularly where there are elderly and other vulnerable populations in order to sustain health and safety during extreme temperatures.

2605(b)(5)  
2605(c)(1)  
(B) & (D)

### **WEATHERIZATION & OTHER ENERGY RELATED HOME REPAIR AND IMPROVEMENTS**

**What LIHEAP weatherization services/materials do you provide? (Check all categories that apply.)**

- ☒ Weatherization needs assessments/audits.
- ☒ Caulking, insulation, storm windows, etc.
- ☒ Furnace/heating system modifications/repairs
- ☒ Furnace replacement
- ☒ Cooling efficiency mods/repairs/replacement
- ☒ Other:
  - \*Compact Fluorescent Lights
  - \*Refrigerators
  - \*Hot Water Heaters
  - \*Health and Safety energy-related measures: floors, ceilings, walls

**Do you have a maximum LIHEAP weatherization benefit/expenditure levels)**  
If yes, what is the maximum amount? **\$5770**. Funds exceeding \$2,885 per home will be considered LIHEAP WAP funds.

### **TYPES OF RULES**

Under what rule do you administer LIHEAP weatherization? (Check one.)

- ☐ Entirely under LIHEAP (not DOE) rules
- ☒ Entirely under DOE LIWAP rules
- ☐ Mostly under LIHEAP rules with the following DOE LIWAP rule(s) where

**LIHEAP and LIWAP rules differ** (Check all that apply):

- ☐ Weatherize buildings if at least 66% of units (50% in 2- & 4-unit



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- \_\_\_\_\_ buildings) are eligible units or will become eligible within 180 days
- \_\_\_\_\_ Weatherize shelters temporarily housing primarily low income persons (excluding nursing homes, prisons, and similar institutional care facilities)
- \_\_\_\_\_ Other (Please describe)
- \_\_\_\_\_ Mostly under DOE LIWAP rules, with the following LIHEAP rule(s) where LIHEAP and LIWAP rules differ
- \_\_\_\_\_ Weatherization not subject to DOE LIWAP maximum statewide average cost per dwelling unit.
- \_\_\_\_\_ Other:

**LIHEAP  
Statutory  
References  
2605(b)(6)**

**AGENCY DESIGNATION**

**The state or tribe administers LIHEAP through the following local agencies:**

- \_\_\_\_\_ county welfare offices
- \_\_\_\_\_ community action agencies (weatherization component only)
- ☒ community action agencies (heating, cooling or crisis)
- \_\_\_\_\_ charitable organizations
- \_\_\_\_\_ not applicable (i.e. state energy office)
- \_\_\_\_\_ tribal office
- \_\_\_\_\_ other, describe:

**Have you changed local administering agencies from last year?**

\_\_\_\_\_ Yes ☒ No

**TARGETING ASSISTANCE**

**2605I(1)(E)** Please describe any additional steps (other than those described elsewhere in this plan) that will be taken to target assistance to households with high home energy burdens. **(This applies to all components. If all steps to target households with high home energy burdens are described elsewhere in the plan, no further information is required here.)**

Described elsewhere in the plan.

**ENERGY SUPPLIERS**

**2605(b)(7)** **Does the State make payments directly to home energy suppliers?**

Heating	_____ Yes	<input checked="" type="checkbox"/> No
Cooling	_____ Yes	<input checked="" type="checkbox"/> No
Crisis	_____ Yes	<input checked="" type="checkbox"/> No

**LIHEAP  
Statutory  
References**

**2605(b)(7)(A)**

**If you make payments directly to home energy suppliers, how do you notify the client of the amount of assistance paid? (Please describe)**

N/A

**2605(b)(7)  
(B) & (C)**

**How do you make sure the home energy supplier performs what is required in this assurance? If vendor agreements are used, they may be attached. Indicate each component for which this description applies.**

Refer Appendix J: Vendor Agreement. Each participating vendor is required to contract with the participating community action agency. Each vendor must comply with the Agreement terms and conditions. Agreements and vendor payment logs are reviewed during monitoring.

**2605(b)(8)(B)**

**OWNERS AND RENTERS**

**Is there any difference in the way owners and renters are treated? If yes, please describe.**

**HEATING ASSISTANCE**

\_\_\_\_\_ Yes   X   No

**COOLING ASSISTANCE**

\_\_\_\_\_ Yes   X   No

**CRISIS ASSISTANCE**

\_\_\_\_\_ Yes   X   No

**WEATHERIZATION**

  X   Yes \_\_\_\_\_ No (Must have permission of owner and assurance that improvements resulting from Weatherization will not increase the client's rent.)

**LIHEAP  
Statutory  
References  
2605(b)(10)**

**PROGRAM, FISCAL MONITORING AND AUDIT**

**How do you ensure good fiscal accounting and tracking of LIHEAP funds?  
(Please describe. Include a description of how you monitor fiscal activities.)**

**(Program Field Monitoring)**: Following field visits, comprehensive Field Monitoring Reports are prepared and submitted to the Subgrantee within 30 business days of each visit. The report is an analysis of the Subgrantee's year-to-date progress with Performance Targets, projected outcomes and expenditures. The report identifies best practices and compliance with Federal and State policies and regulations. The report is distributed to the Executive Director, Program Director and Board Chairperson. With each report, Subgrantees have the right of appeal and time to correct identified deficiencies.

Subgrantees submit a Monthly Program Status Report (PSR) identifying total households served, denied service, applicable Federal Poverty Levels, the number of vulnerable households served and program expenditures.

**(Fiscal Monitoring)**: The OEO maintains the internal controls and financial management system necessary to accurately account for LIHEAP expenditures; both fiscally and programmatically. OEO's fiscal team initially reviews and approves budget applications, then closely monitors comprehensive expenditure reports and monthly financial status reports prepared/submitted by Subgrantees. Technical assistance and fiscal training is ongoing and an annual fiscal training is provided for agency fiscal officers and staff.

**How do you monitor program activities? (Please be sure to include a description of how you monitor eligibility and benefit determination.)**

Each program component is monitored for fiscal/program compliance through the SC ROMA (Results-Oriented Management and Accountability System) Client Tracking System and through monthly PSRs submitted by Subgrantees. Field monitoring visits are conducted at least once during the year at each agency where program files are inspected for income eligibility documentation and benefit calculation. Desk reviews of program progress are conducted routinely. Refer Appendix H: OEO LIHEAP Monitoring Instrument.

**How is your LIHEAP program audited?**

**Under the Single Audit Act?  X  Yes\*         No**

\*On-site field audits are also conducted and as often as is needed to ensure compliance and provision of technical assistance. Single Audit desk reviews are also conducted by the OEO.

**LIHEAP  
Statutory  
References  
2605(b)(12)**

**TIMELY AND MEANINGFUL PUBLIC PARTICIPATION**

**How did you get timely and meaningful public participation in the development of the plan? (Please describe.)**

The Office of Economic Opportunity (OEO) will hold a public hearing on Friday, July 20, 1007 at 2:30 p.m. in Room 364 of the Edgar A. Brown Building, Columbia, South Carolina. The hearing will provide the public an opportunity to comment on the proposed use and distribution of LIHEAP funds. During on-site visits, training opportunities and communication with Subgrantees throughout the year, suggestions are solicited.

**2605(a)(2)**

**Did you conduct public hearings on the proposed use and distribution of your LIHEAP funds? When and where?**

  X   Yes           No

**Details and Location of Public Hearing**

**Date:** July 20, 2007

**Time:** 2:30 p.m.

**Location:** Room 364 in the Edgar A. Brown, Columbia, South Carolina  
2008 State Plan also available for review on web site:

[www.oepp.sc.gov/oeo/](http://www.oepp.sc.gov/oeo/).

**2605(b)(13)**

**APPEALS AND FAIR HEARINGS**

**Describe your fair hearing procedures for households whose applications are denied or not acted on in a timely manner. When are applicants informed of these rights?**

An OEO-approved Appeal and Fair Hearing notice must be posted in the lobbies and at intake sites where LIHEAP applications are taken. OEO verifies this during the monitoring process and the submission of the Work Plan for LIHEAP.

**Denials:** Clients who assert being unfairly treated and/or denied assistance and/or services must be informed in writing or at the time of application of the reason for denial. Such notification must clearly cite the reason for denial. If not resolved by the Program Coordinator within a reasonable time, the client is to be provided an opportunity to appeal/request an official hearing.

**Examples – A Notice of Denial will be issued when:**

- \* applicant is refused access to services and financial assistance
- \* applicant does not fulfill his/her obligations to program participatory requirements or exceeds the 150% income eligibility requirement
- \* applicant does not provide sufficient information to complete his/her application or has knowingly provided false and/or misleading information
- \* applicant has maxed out his/her eligibility for program assistance during the program year
- \* funds are exhausted
- \* applicant has not met the time restraints on program availability (e.g. between LIHEAP heating and cooling periods)

LIHEAP  
Statutory  
References  
2605(b)(15)

**Applications Not Acted On In a Timely Manner**

Applicants whose applications are not processed in a timely manner are notified in writing or at the time of application to the right to a Fair Hearing. OEO will provide training and technical assistance to agencies whose applications fail to be processed within the time frame approved in the current year's Work Plan.

**ALTERNATE OUTREACH AND INTAKE**

**For States and Puerto Rico only** (not applicable to Tribes and tribal organizations, or to territories whose annual regular LIHEAP allotments are \$200,000 or less): **Does the State agency that administers the following LIHEAP component also administer the State's welfare program?**

**HEATING ASSISTANCE**

\_\_\_\_\_ Yes   X   No

**COOLING ASSISTANCE**

\_\_\_\_\_ Yes   X   No

**CRISIS ASSISTANCE**

\_\_\_\_\_ Yes   X   No

**LIHEAP  
Statutory  
References  
2605(b)(16)**

**Do you use LIHEAP funds to provide services that encourage and enable households to reduce their home energy needs and thereby the need for energy assistance?** (This assurance refers to activities such as needs assessments, counseling, and assistance with energy vendors.)

  X   Yes           No

**If yes, describe these activities.**

Each Subgrantee's LIHEAP Work Plan must clearly describe methods the agency will implement during the program year to encourage and educate high energy user households on home energy usage.

This is accomplished through household assessment, agency referrals, income management counseling, energy workshops and educational materials, intervention with energy vendors to promote client responsibility and prevent energy crisis, and follow-up evaluation with the family to ensure progress.

**If yes, how do you ensure that you don't use more than 5% (statutory ceiling) of your LIHEAP funds for these activities?**

The OEO initially allocates 5% funding to each Subgrantee specifically for this purpose and throughout the year closely monitors each budget submission and financial report to ensure compliance.

**LIHEAP  
Statutory  
References  
2607A**

**LEVERAGING**

**Please describe leveraging activities planned for the fiscal year. (This entry is optional.)\*** Complete this entry if you plan to apply for LIHEAP leveraging incentive funds and to include in your leveraging report resources/benefits provided to low income households this fiscal year under criterion (iii) in 45 CFR 96.87(d)(2). Provide the following information for each:

- (1) Identify and described each resource/benefit;
- (2) Identify the source(s) of each resource; and
- (3) Describe the integration/coordination of each resource/benefit with the LIHEAP program, consistent with 1 or more of conditions A-H in 45 CFR 96.87(d)(2)(iii).

**N/A**

- (864) Leveraged resources/benefits that are counted under criterion (iii) in 45 CFR 96.87(d)(2) must be identified and described in the grantee's LIHEAP plan and distributed as indicated in the plan. In addition, leveraging resources/benefits that are counted under criterion (ii) must be carried out under one or more components of the grantee's regular LIHEAP program.

**PERFORMANCE GOALS AND MEASURES**

**2605(b)** **Please describe performance goals and measures planned for the fiscal year. (This entry is optional.)**

**Goal 1:** Subgrantee Performance Target Outcomes will project increase in outreach to unserved households during the Program Year.

**Measure:** Subgrantee Work Plan initial projection(s) will document increase in service to previously unserved households. Client files will substantiate.

**Goal 2:** Target energy assistance to low-income households with the highest home energy needs and lowest incomes, taking into account both the energy burdens and the vulnerable household members.

**Measure:** Direct Assistance to provide additional financial benefits for vulnerable households; households with children age 5 and younger, elderly, disabled and income 100% FPL.

**Measure:** Ratio of percent of vulnerable households served to the percent of all eligible households served. Household Summary Report will reflect.

**Measure:** Change in energy burden before and after LIHEAP assistance within program elements (heating, cooling, crisis, and weatherization). Client files will substantiate.

**Goal 3:** Increase efficiency of energy usage by applicant households.

Measure: Change in energy consumption before and after LIHEAP counseling assistance. Change in the number of LIHEAP recipients making regular payments to energy suppliers (improved credit history).

Measure: Number of LIHEAP recipient households weatherized.

Measure: Reduction in the number of repeat LIHEAP households requesting regular assistance in consecutive years.

Measure: Number of referrals to other programs and services.

Measure: Client files to validate receipt of education requirement.

**Goal 4:** Identify resources to broaden the reach of LIHEAP funds.

Measure: Project Share fund balances will reflect agency use of those funds when possible.

Measure: Applicant files will reflect use of local resources when possible.

Measure: Applicant files will reflect vendor negotiations which will permit clients to pay energy bills.

Measure: Applicant files will reflect the use of other funds to pay client utility bills when possible.

**Goal 5:** Address inefficient home heating/cooling systems through repair and or replacement. Recommended Subgrantees work through the Weatherization program to ensure efficiency in output.

Measure: Reduction in the number of households requesting assistance with high home energy costs in consecutive years.

Measure: Improved coordination and program service delivery through whole house weatherization concept resulting in energy efficiency output.



## **CERTIFICATIONS**

**Certification Regarding Lobbying**

**Certification Regarding Debarment, Suspension and Other Responsibility Matters**

**Certification Regarding Drug-Free Workplace Requirements**

## **CERTIFICATION REGARDING LOBBYING**

### **Certification for Contracts, Grants, Loans, and Cooperative Agreements**

The undersigned certifies, to the best of his or her knowledge and belief, that:

(1) No Federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of an agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal contract, the making of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal contract, grant, loan, or cooperative agreement.

(2) If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit Standard Form-LLL, "Disclosure Form to Report Lobbying," in accordance with its instructions.

(3) The undersigned shall require that the language of this certification be included in the award documents for all subawards at all tiers (including subcontracts, subgrants, and contracts under grants, loans, and cooperative agreements) and that all subrecipients shall certify and disclose accordingly. This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by section 1352, title 31, U.S. Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

### **Statement for Loan Guarantees and Loan Insurance**

The undersigned states, to the best of his or her knowledge and belief, that:

If any funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this commitment providing for the United States to insure or guarantee a loan, the undersigned shall complete and submit Standard Form-LLL, "Disclosure Form to Report Lobbying," in accordance with its instructions. Submission of this statement is a prerequisite for making or entering into this transaction imposed by section 1352, title 31, U.S. Code. Any person who fails to file the required statement shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

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**Signature**

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**OEO Director**

**Title**

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**South Carolina Governor's Office – Office of Economic Opportunity**

**Organization**

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## **CERTIFICATION REGARDING DEBARMENT, SUSPENSION AND OTHER RESPONSIBILITY MATTERS**

### **Certification Regarding Debarment, Suspension, and Other Responsibility Matters—Primary Covered Transactions**

#### **Instructions for Certification**

- (864) By signing and submitting this proposal, the prospective primary participant is providing the certification set out below.
2. The inability of a person to provide the certification required below will not necessarily result in denial of participation in this covered transaction. The prospective participant shall submit an explanation of why it cannot provide the certification set out below. The certification or explanation will be considered in connection with the department or agency's determination whether to enter into this transaction. However, failure of the prospective primary participant to furnish a certification or an explanation shall disqualify such person from participation in this transaction.
  3. The certification in this clause is a material representation of fact upon which reliance was placed when the department or agency determined to enter into this transaction. If it is later determined that the prospective primary participant knowingly rendered an erroneous certification, in addition to other remedies available to the Federal Government, the department or agency may terminate this transaction for cause or default.
  4. The prospective primary participant shall provide immediate written notice to the department or agency to which this proposal is submitted if at any time the prospective primary participant learns that its certification was erroneous when submitted or has become erroneous by reason of changed circumstances.
  5. The terms covered transaction, debarred, suspended, ineligible, lower tier covered transaction, participant, person, primary covered transaction, principal, proposal, and voluntarily excluded, as used in this clause, have the meanings set out in the Definitions and Coverage sections of the rules implementing Executive Order 12549. You may contact the department or agency to which this proposal is being submitted for assistance in obtaining a copy of those regulations.
  6. The prospective primary participant agrees by submitting this proposal that, should the proposed covered transaction be entered into, it shall not knowingly enter into any lower tier covered transaction with a person who is proposed for debarment under 48 CFR part 9, subpart 9.4, debarred, suspended, declared ineligible, or voluntarily excluded from participation in this covered transaction, unless authorized by the department or agency entering into this transaction.
  7. The prospective primary participant further agrees by submitting this proposal that it will include the clause titled "Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion-Lower Tier Covered Transaction," provided by the department or agency entering into this covered transaction, without modification, in all lower tier covered transactions and in all solicitations for lower tier covered transactions.
  8. A participant in a covered transaction may rely upon a certification of a prospective participant in a lower tier covered transaction that it is not proposed for debarment under 48 CFR part 9, subpart 9.4, debarred, suspended, ineligible, or voluntarily excluded from the covered transaction, unless it knows that the certification is erroneous. A participant may decide the method and frequency by which it determines the eligibility of its principals. Each participant may, but is not required to, check the List of Parties Excluded from Federal Procurement and Nonprocurement Programs.
  9. Nothing contained in the foregoing shall be construed to require establishment of a system of records in order to render in good faith the certification required by this clause. The knowledge and information of a participant is not required to exceed that which is normally possessed by a

prudent person in the ordinary course of business dealings.

10. Except for transactions authorized under paragraph 6 of these instructions, if a participant in a covered transaction knowingly enters into a lower tier covered transaction with a person who is proposed for debarment under 48 CFR part 9, subpart 9.4, suspended, debarred, ineligible, or voluntarily excluded from participation in this transaction, in addition to other remedies available to the Federal Government, the department or agency may terminate this transaction for cause or default.

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#### Certification Regarding Debarment, Suspension, and Other Responsibility Matters— Primary Covered Transactions

- (1) The prospective primary participant certifies to the best of its knowledge and belief, that it and its principals:
- (a) Are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded by any Federal department or agency;
  - (b) Have not within a three-year period preceding this proposal been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State or local) transaction or contract under a public transaction; violation of Federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;
  - (c) Are not presently indicted for or otherwise criminally or civilly charged by a governmental entity (Federal, State or local) with commission of any of the offenses enumerated in paragraph (1)(b) of this certification; and
  - (d) Have not within a three-year period preceding this application/proposal had one or more public transactions (Federal, State or local) terminated for cause or default.
- (2) Where the prospective primary participant is unable to certify to any of the statements in this certification, such prospective participant shall attach an explanation to this proposal.

#### Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion—Lower Tier Covered Transactions

##### Instructions for Certification

1. By signing and submitting this proposal, the prospective lower tier participant is providing the certification set out below.
2. The certification in this clause is a material representation of fact upon which reliance was placed when this transaction was entered into. If it is later determined that the prospective lower tier participant knowingly rendered an erroneous certification, in addition to other remedies available to the Federal Government the department or agency with which this transaction originated may pursue available remedies, including suspension and/or debarment.
3. The prospective lower tier participant shall provide immediate written notice to the person to which this proposal is submitted if at any time the prospective lower tier participant learns that its certification was erroneous when submitted or had become erroneous by reason of changed circumstances.
4. The terms covered transaction, debarred, suspended, ineligible, lower tier covered transaction, participant, person, primary covered transaction, principal, proposal, and voluntarily excluded, as used in this clause, have the meaning set out in the Definitions and Coverage sections of rules implementing Executive Order 12549. You may contact the person to which this proposal is submitted for assistance in obtaining a copy of those regulations.
5. The prospective lower tier participant agrees by submitting this proposal that, [[Page 33043]] should the proposed covered transaction be entered into, it shall not knowingly enter into any lower tier covered

transaction with a person who is proposed for debarment under 48 CFR part 9, subpart 9.4, debarred, suspended, declared ineligible, or voluntarily excluded from participation in this covered transaction, unless authorized by the department or agency with which this transaction originated.

6. The prospective lower tier participant further agrees by submitting this proposal that it will include this clause titled ``Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion-Lower Tier Covered Transaction,’’ without modification, in all lower tier covered transactions and in all solicitations for lower tier covered transactions.

7. A participant in a covered transaction may rely upon a certification of a prospective participant in a lower tier covered transaction that it is not proposed for debarment under 48 CFR part 9, subpart 9.4, debarred, suspended, ineligible, or voluntarily excluded from covered transactions, unless it knows that the certification is erroneous. A participant may decide the method and frequency by which it determines the eligibility of its principals. Each participant may, but is not required to, check the List of Parties Excluded from Federal Procurement and Nonprocurement Programs.

8. Nothing contained in the foregoing shall be construed to require establishment of a system of records in order to render in good faith the certification required by this clause. The knowledge and information of a participant is not required to exceed that which is normally possessed by a prudent person in the ordinary course of business dealings.

9. Except for transactions authorized under paragraph 5 of these instructions, if a participant in a covered transaction knowingly enters into a lower tier covered transaction with a person who is proposed for debarment under 48 CFR part 9, subpart 9.4, suspended, debarred, ineligible, or voluntarily excluded from participation in this transaction, in addition to other remedies available to the Federal Government, the department or agency with which this transaction originated may pursue available remedies, including suspension and/or debarment.

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Certification Regarding Debarment, Suspension, Ineligibility an Voluntary Exclusion–Lower Tier Covered Transactions

(1) The prospective lower tier participant certifies, by submission of this proposal, that neither it nor its principals is presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any Federal department or agency.

(2) Where the prospective lower tier participant is unable to certify to any of the statements in this certification, such prospective participant shall attach an explanation to this proposal.

## CERTIFICATION REGARDING DRUG-FREE WORKPLACE REQUIREMENTS

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This certification is required by the regulations implementing the Drug-Free Workplace Act of 1988: 45 CFR Part 76, Subpart, F. Sections 76.630I and (d)(2) and 76.645(a)(1) and (b) provide that a Federal agency may designate a central receipt point for STATE-WIDE AND STATE AGENCY-WIDE certifications, and for notification of criminal drug convictions. For the Department of Health and Human Services, the central point is: Division of Grants Management and Oversight, Office of Management and Acquisition, Department of Health and Human Services, Room 517-D, 200 Independence Avenue, SW Washington, DC 20201.

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### Certification Regarding Drug-Free Workplace Requirements (Instructions for Certification)

1. By signing and/or submitting this application or grant agreement, the grantee is providing the certification set out below.
2. The certification set out below is a material representation of fact upon which reliance is placed when the agency awards the grant. If it is later determined that the grantee knowingly rendered a false certification, or otherwise violates the requirements of the Drug-Free Workplace Act, the agency, in addition to any other remedies available to the Federal Government, may take action authorized under the Drug-Free Workplace Act.
3. For grantees other than individuals, Alternate I applies.
4. For grantees who are individuals, Alternate II applies.
5. Workplaces under grants, for grantees other than individuals, need not be identified on the certification. If known, they may be identified in the grant application. If the grantee does not identify the workplaces at the time of application, or upon award, if there is no application, the grantee must keep the identity of the workplace(s) on file in its office and make the information available for Federal inspection. Failure to identify all known workplaces constitutes a violation of the grantee's drug-free workplace requirements.
6. Workplace identifications must include the actual address of buildings (or parts of buildings) or other sites where work under the grant takes place. Categorical descriptions may be used (e.g., all vehicles of a mass transit authority or State highway department while in operation, State employees in each local unemployment office, performers in concert halls or radio studios).
7. If the workplace identified to the agency changes during the performance of the grant, the grantee shall inform the agency of the change(s), if it previously identified the workplaces in question (see paragraph five).
8. Definitions of terms in the Nonprocurement Suspension and Debarment common rule and Drug-Free Workplace common rule apply to this certification. Grantees' attention is called, in particular, to the following definitions from these rules:

*Controlled substance* means a controlled substance in Schedules I through V of the Controlled Substances Act (21 U.S.C. 812) and as further defined by regulation (21 CFR 1308.11 through 1308.15);

*Conviction* means a finding of guilt (including a plea of nolo contendere) or imposition of sentence, or both, by any judicial body charged with the responsibility to determine violations of the Federal or State

criminal drug statutes;

*Criminal drug statute* means a Federal or non-Federal criminal statute involving the manufacture, distribution, dispensing, use, or possession of any controlled substance;

*Employee* means the employee of a grantee directly engaged in the performance of work under a grant, including: (i) All direct charge employees; (ii) All indirect charge employees unless their impact or involvement is insignificant to the performance of the grant; and, (iii) Temporary personnel and consultants who are directly engaged in the performance of work under the grant and who are on the grantee's payroll. This definition does not include workers not on the payroll of the grantee (e.g., volunteers, even if used to meet a matching requirement; consultants or independent contractors not on the grantee's payroll; or employees of subrecipients or subcontractors in covered workplaces).

#### Certification Regarding Drug-Free Workplace Requirements

##### Alternate I. (Grantees Other Than Individuals)

The grantee certifies that it will or will continue to provide a drug-free workplace by:

- (a) Publishing a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the grantee's workplace and specifying the actions that will be taken against employees for violation of such prohibition;
- (b) Establishing an ongoing drug-free awareness program to inform employees about –
  - (1) The dangers of drug abuse in the workplace;
  - (2) The grantee's policy of maintaining a drug-free workplace;
  - (3) Any available drug counseling, rehabilitation, and employee assistance programs; and
  - (4) The penalties that may be imposed upon employees for drug abuse violations occurring in the workplace;
- I Making it a requirement that each employee to be engaged in the performance of the grant be given a copy of the statement required by paragraph (a);
- (d) Notifying the employee in the statement required by paragraph (a) that, as a condition of employment under the grant, the employee will –
  - (1) Abide by the terms of the statement; and
  - (2) Notify the employer in writing of his or her conviction for a violation of a criminal drug statute occurring in the workplace no later than five calendar days after such conviction;
- (e) Notifying the agency in writing, within ten calendar days after receiving notice under paragraph (d)(2) from an employee or otherwise receiving actual notice of such conviction. Employers of convicted employees must provide notice, including position title, to every grant officer or other designee on whose grant activity the convicted employee was working, unless the Federal agency has designated a central point for the receipt of such notices. Notice shall include the identification number(s) of each affected grant;
- (f) Taking one of the following actions, within 30 calendar days of receiving notice under paragraph (d)(2), with respect to any employee who is so convicted –
  - (1) Taking appropriate personnel action against such an employee, up to and including termination, consistent with the requirements of the Rehabilitation Act of 1973, as amended; or
  - (2) Requiring such employee to participate satisfactorily in a drug abuse assistance or rehabilitation program approved for such purposes by a Federal, State, or local health, law enforcement, or other appropriate agency;
- (g) Making a good faith effort to continue to maintain a drug-free workplace through implementation of paragraphs (a), (b), (c), (d), (e) and (f).

(B) The grantee may insert in the space provided below the site(s) for the performance of work done in connection with the specific grant:

**South Carolina Governor's Office of Economic Opportunity**

<b>1205 Pendleton Street, Edgar A. Brown Building, 3<sup>rd</sup> Floor</b>
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<b>Columbia, SC 29201</b>
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Check if there are workplaces on file that are not identified here.

**Alternate II. (Grantees Who Are Individuals)**

(a) The grantee certifies that, as a condition of the grant, he or she will not engage in the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance in conducting any activity with the grant;

(b) If convicted of a criminal drug offense resulting from a violation occurring during the conduct of any grant activity, he or she will report the conviction, in writing, within 10 calendar days of the conviction, to every grant officer or other designee, unless the Federal agency designates a central point for the receipt of such notices. When notice is made to such a central point, it shall include the identification number(s) of each affected grant.

[55 FR 21690, 21702, May 25, 1990]

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## **APPENDICES**

**Appendix A – PY LIHEAP Community Action Partners**

**Appendix B – 2007 LIHEAP Household Report**

**Appendix C – Public Hearing Notice and Transcript**

**Appendix D – 2007 Poverty Income Guidelines**

**Appendix E – OEO 2008 Application for Program Services**

**Appendix F – Program Status Report (PSR)**

**Appendix G – Audit Review Guide**

**Appendix H – LIHEAP Monitoring Instrument**

**Appendix I – 2008 LIHEAP Work Plan**

**Appendix J – Vendor Agreement**

**Appendix K – 2008 LIHEAP Statistical Sheet**

**Appendix L – State Plan Distribution List**

## PY 2008 LIHEAP COMMUNITY ACTION PARTNERS

AGENCY	LIHEAP PROGRAM DIRECTOR
<b>Aiken/Barnwell/Lexington Counties Community Action Commission</b> <b>Mr. George A. Anderson</b> Executive Director 291 Beaufort Street Aiken, SC 29801 (803) 648-6836	<b>Marianne Peterson</b> <a href="mailto:mpete@abcac.org">mpete@abcac.org</a> (803) 648-6836
<b>Beaufort-Jasper Economic Opportunity Commission</b> <b>Mr. Leroy H. Gilliard</b> Executive Director 1905 Duke St. Beaufort, SC 29902 (843) 470-4500	<b>Sarah Marshall</b> <a href="mailto:beaufortjaspereoc@hotmail.com">beaufortjaspereoc@hotmail.com</a> (843) 470-4507
<b>Berkeley-Dorchester Counties Economic Development Corporation</b> <b>Ms. Patsy Gardner</b> Executive Director 295 N. Highway 52 Moncks Corner, SC 29461 (843) 761-8244	<b>Pathenia Scott</b> <a href="mailto:patheniascott@bdcedc.org">patheniascott@bdcedc.org</a> (843) 719-3033
<b>Carolina Community Actions</b> <b>Mr. Walter H. Kellogg</b> Executive Director 138 South Oakland Avenue Rock Hill, SC 29731 (803) 329-5195	<b>Mary Reid</b> <a href="mailto:cca3@infoave.net">cca3@infoave.net</a> (803) 329-5195
<b>Charleston County Human Services</b> <b>Mr. Arnold Collins</b> Executive Director 1069 King Street Charleston, SC 29403 (843) 724-6760	<b>Tami McCrackin</b> <a href="mailto:tmccrackin@cchsc.com">tmccrackin@cchsc.com</a> (843) 723-9285 ext. 15
<b>Chesterfield-Marlboro Economic Opportunity Council</b> <b>Mr. Samuel D. Bass, Jr.</b> Executive Director 318-322 Front Street Cheraw, SC 29520 (843) 320-9760	<b>Gloria McFarlan</b> <a href="mailto:gmcfarlan@cm_eoc.org">gmcfarlan@cm_eoc.org</a> (843) 320-9760
<b>GLEAMNS Human Resources Commission</b> <b>Dr. J.D. Patton, III</b> Executive Director 237 Hospital Street Greenwood, SC 29648 (864) 223-8434	<b>Columbus Stephens</b> <a href="mailto:cstephens@gleamshrc.org">cstephens@gleamshrc.org</a> (864) 223-8434 ext. 1046

<b>Lowcountry Community Action Agency</b> <b>Mr. Leroy Womble</b> Executive Director 319 Washington Street Walterboro, SC 29488 (843) 549-5576	<b>Emily Mitchell</b> <a href="mailto:malibumont@yahoo.com">malibumont@yahoo.com</a> (843) 549-5576
<b>OCAB Community Action Agency</b> <b>Mr. Calvin Wright</b> Executive Director 1822 Joe Jeffords Highway Orangeburg, SC 29116 (803) 536-1027	<b>Marion (Third) Jamison</b> <a href="mailto:mjamison@ocabcaa.org">mjamison@ocabcaa.org</a> (803) 536-1027
<b>Pee Dee Community Action Agency</b> <b>Mr. Walter Fleming</b> Executive Director 2685 South Irby Street Florence, SC 29501 (843) 678-3400	<b>Queen McCall</b> <a href="mailto:queenmccall@hotmail.com">queenmccall@hotmail.com</a> (843) 678-3400 ext. 121
<b>Piedmont Community Actions</b> <b>Dr. Willie Ross, Jr.</b> Executive Director 300A S. Daniel Morgan Ave. Spartanburg, SC 29306 (864) 585-8183	<b>Jean Mullinax</b> <a href="mailto:jhmullinax@pcasp.org">jhmullinax@pcasp.org</a> (864) 327-1127
<b>Sunbelt Human Advancement Resources</b> <b>Dr. Willis H. Crosby, Jr.</b> Executive Director 1200 Pendleton Street Greenville, SC 29611 (864) 269-0700	<b>Betty Cox</b> <a href="mailto:bcox@sharenc.org">bcox@sharenc.org</a> (864) 269-0700
<b>Waccamaw Economic Opportunity Council</b> <b>Ms. Beth Fryar</b> Executive Director 1261 Hwy. 501 East, Suite B Conway, SC 29528-1467 (843) 234-1400	<b>Emily Cooper</b> <a href="mailto:emilyc.cooper@weoc.org">emilyc.cooper@weoc.org</a> (843) 355-9922
<b>Wateree Community Actions</b> <b>Mr. Willie Bethune</b> Executive Director 13 South Main Street Sumter, SC 29150 (803) 775-4354	<b>Fredrica Brailsford</b> <a href="mailto:wcaicssfc@ftc-i.net">wcaicssfc@ftc-i.net</a> (803) 773-6512 ext. 311
<b>SC ASSOCIATION OF CAP</b> Ms. Jessica McMoore Executive Director 2700 Middleburg Drive Suite 213 Columbia, SC 29204 (803) 771-9404	

**(Household Report 2007)**

## NOTICE OF PUBLIC HEARING

A combined Public Hearing as required by the Community Services Block Grant (Section 676(a)(3)) and the Low-Income Home Energy Assistance Program (Section 2605(a)(2) and 2605(b)(12)) will be conducted by the Governor's Office of Economic Opportunity in Columbia, South Carolina, on Friday, July 20, 2007 at 2:30 p.m. in Room 364 of the Edgar A. Brown Building, 1205 Pendleton Street, Capital Complex. At that time, public comments will be received on the proposed 2008 State Plans for the Community Services Block Grant (CSBG) and the Low-Income Home Energy Assistance Program Block Grant (LIHEAP).

The U.S. Department of Health and Human Services, Administration for Children and Families, Office of Community Services, Division of State Assistance administers the CSBG program and LIHEAP is administered by the Division of Energy Assistance. Federal governing regulations for CSBG are P.L. 105-285 and the Community Services Block Grant (42 U.S.C. 9901 et seq.), as amended; and for LIHEAP, the Low-Income Home Energy Assistance Act, Title XXVI of the Omnibus Budget Reconciliation Act of 1981, P.L. 97-35, as amended and more recently, The 2005 Energy Policy Act.

The CSBG State Plan identifies the State's intent to fund local community initiatives and statewide programs designed to reduce the adverse affects of poverty, increase self-sufficiency and revitalize low-income communities. The plan provides eligibility requirements, benefit levels and the projected program allocation.

The LIHEAP State Plan outlines eligibility requirements, benefit levels and the projected funds for each category of LIHEAP assistance. LIHEAP funds are used to assist eligible households with home energy costs, energy crisis intervention, energy conservation counseling and low-cost residential weatherization.

The proposed CSBG and LIHEAP 2008 State Plans are available and may be reviewed at the main office of each of the fifteen Community Action Agencies located throughout the State or at the Office of the Governor, Office of Economic Opportunity, Edgar A. Brown Building, 1205 Pendleton Street, Columbia, South Carolina. Both State Plans may also be viewed at [www.oepp.sc.gov/oeo/](http://www.oepp.sc.gov/oeo/).

Persons desiring to submit comments on the CSBG and/or the LIHEAP State Plan for 2008 may do so in writing prior to Friday, July 20, 2007. Comments may be mailed or hand-delivered to the Office of Economic Opportunity at the above mentioned address. Comments on the CSBG State Plan should be forwarded to Ms. Bertie McKie, Senior Manager for Community Services. Comments on the LIHEAP State Plan should be directed to Ms. Rosalie Smith, Senior Manager for LIHEAP.

## 2007 POVERTY INCOME GUIDELINES\*

### FOR THE 48 CONTIGUOUS STATES AND THE DISTRICT OF COLUMBIA

(AMOUNTS SHOWN ARE COMPUTED AT 150% OF POVERTY GUIDELINES)

FAMILY SIZE	150% MONTHLY POVERTY GUIDELINE	150% ANNUAL POVERTY GUIDELINE
1	\$1,276	\$15,315
2	\$1,711	\$20,535
3	\$2,146	\$25,755
4	\$2,581	\$30,975
5	\$3,016	\$36,195
6	\$3,451	\$41,415
7	\$3,886	\$46,635
8	\$4,321	\$51,855
For each additional person, add	\$435	\$5,220

**\*Special Note:** The 2008 Federal Poverty Guidelines will be issued when published and available in the 2008 Federal Register (approximately mid-march). Until then, continue to use the 2007 FPG.

## APPLICATION FOR PROGRAM SERVICE

FAMILY ID: DATE: ☐ NEW APPLICANT☐ APPLICANT ON FILE☐ HBAINTAKE DATE: FIRST NAME  MN  LAST NAME   
Area Code  Telephone Number  -  - 

Social Security Number

☐ HOME☐ CELL☐ CONTACT: Is applicant's home telephone in his/her name? ☐ No ☐ YesIf yes, telephone company's name: Home Address City/Town Zip Code Mailing Address (if different)  
LOCATION: ☐ CITY ☐ RURALCity/Town Zip Code RACE: ☐ WHITE ☐ BLACK ☐ MULT-RACE ☐ OTHERETHNICITY: ☐ HISPANIC/LATINO ☐ NOT HISPANIC/LATINOMARITAL STATUS: ☐ SINGLE ☐ MARRIED ☐ WIDOWED ☐ DIVORCED ☐ SEPARATEDHOUSING STATUS: ☐ OWNED ☐ RENTED ☐ SUBSIDIZED ☐ SHELTER ☐ HOMELESSFAMILY TYPE: ☐ SINGLE ☐ SINGLE PARENT FEMALE ☐ SINGLE PARENT MALE  
☐ TWO-ADULTS WITH CHILDREN ☐ TWO-ADULTS - NO CHILDRENIndicate the total monthly benefit for all household members receiving: \$  FOOD STAMPS \$  WICEMPLOYMENT: ☐ NO ☐ YESEMPLOYER'S NAME: EMPLOYER'S ADDRESS/PHONE: OCCUPATION: ☐ LABORER ☐ SKILLED ☐ SALES ☐ PROFESSIONAL ☐ RETIRED ☐ STUDENT ☐ CLERICALHOW LONG EMPLOYED:  YEARS  MONTHS  WEEKS

NAME	Social Security Number (SSN)	Relation to Applicant	Dis-abled Y/N	Birth Date	Ins. Y/N	Sex M/F	Last Grade Compl.	Income Source	CSBG/LIHEAP	WAP
									Total (Gross) Monthly Income	Total (GROSS) Monthly Income
1. APPLICANT	APPLICANT								\$	\$
2.									\$	\$
3.									\$	\$
4.									\$	\$
5.									\$	\$
6.									\$	\$
7.									\$	\$
8.									\$	\$
TOTAL MONTHLY HOUSEHOLD INCOME									\$	\$

## INCOME SOURCE CODES

- 1) MONEY, WAGES, SALARIES
- 2) NET RECEIPTS from Non-Farm/Farm self-employment
- 3) SOCIAL SECURITY
- 4) SSI - Supplemental Security Income
- 5) TANF- Temporary Assistance for Needy Families
- 6) PRIVATE OR RAILROAD RETIREMENT

- 7) GOVERNMENT EMPLOYEE RETIREMENT
- 8) MILITARY RETIREMENT/FAMILY ALLOTMENTS
- 9) UNEMPLOYMENT COMPENSATION
- 10) VETERAN'S PAYMENTS
- 11) ALIMONY
- 12) RENTAL INCOME (Net)
- 13) WORKER'S COMPENSATION

- 14) ESTATES/TRUSTS (Periodic Receipts)
- 15) GAMBLING or LOTTERY WINNINGS (Net)
- 16) REGULAR INSURANCE/ANNUITY PMTS
- 17) STRIKE BENEFITS from UNION FUNDS
- 18) TRAINING STIPENDS
- 19) OTHER - (Identify) \_\_\_\_\_
- 20) ZERO (\$0) INCOME

By my signature, I certify that all of the information I have provided on this application is true and accurate; including self-certification of zero income.

Any misrepresentation, falsification, or omission of information on this application may result in exclusion from further consideration for assistance and services.

I authorize the release of this information for research and other program eligibility considerations and understand that the information acquired through this release not be made public in such a manner that the dwelling or occupants may be identified.

Are you related to an agency employee/board member?

No ☐ Yes ☐ Name: 

Are you an agency employee?

No ☐ Yes ☐

Applicant's Signature

Date

I certify that reasonable attempts have been made to verify the above-reported household income information. I further certify that documentation to verify same is included in the applicant's file/record.

Agency Representative's Signature

Date

Agency Reviewer's Signature

Date

AREAS OF NEED: ☐ Employment ☐ Education ☐ Housing ☐ Nutrition ☐ Health ☐ Emergency ☐ Energy ☐ TransportationPROGRAMS APPLIED FOR ☐ GEAP ☐ CSBG CASE MANAGEMENT ☐ YLP ☐ WEATHERIZATION ☐ NOT ELIGIBLEAND ELIGIBILITY: ☐ LIHEAP D/A ☐ LIHEAP ECIP ☐ PROJECT SHARE (SCE&G) ☐ PROJECT SHARE (DUKE) ☐ PROJECT SHARE (ENF)LIFELINE ELIGIBLE? ☐ FOOD STAMPS ☐ MEDICAID ☐ TANF☐ No ☐ Yes ☐ Currently Enrolled ☐ Company Not on ListFPL:  Date referred: 

## WEATHERIZATION

Do you want to have your home weatherized? ☐ No ☐ YesReferred to: Date referred:

# PROGRAM SERVICES

## CSBG

Type Service: \_\_\_\_\_

EMERGENCY ☐ No ☐ Yes Type: \_\_\_\_\_

Vendor: \_\_\_\_\_

Vendor Address: \_\_\_\_\_

Voucher Date: \_\_\_\_\_

Account #: \_\_\_\_\_

Amount: \_\_\_\_\_

CASE MANAGED?: ☐ No ☐ Yes Type Referral: \_\_\_\_\_

☐ In Crisis ☐ Vulnerable Outcome: \_\_\_\_\_

☐ Stable ☐ Safe

☐ Thriving

Applicant Referred? ☐ No ☐ Yes Type Referral: \_\_\_\_\_

Agency Name: \_\_\_\_\_

125%		
2007 HHS Poverty Guidelines		
Family Unit	Monthly Income	Yearly Income
1	\$1,064	\$12,763
2	\$1,426	\$17,113
3	\$1,789	\$21,463
4	\$2,151	\$25,813
5	\$2,514	\$30,163
6	\$2,876	\$34,513
7	\$3,239	\$38,863
8	\$3,601	\$43,213

## LIHEAP - PROJECT SHARE - SCE&G, DUKE POWER, ENERGY NEIGHBOR FUND - PROGRESS ENERGY

Assistance: ☐ Heating

☐ Cooling

House Exterior: \_\_\_\_\_

Primary Heating Source: \_\_\_\_\_

Secondary Heating Source: \_\_\_\_\_

Cooling Source: \_\_\_\_\_

100%			150%		
2007 HHS Poverty Guidelines			2007 HHS Poverty Guidelines		
Family Unit	Monthly Income	Yearly Income	Family Unit	Monthly Income	Yearly Income
1	\$850	\$10,210	1	\$1,276	\$15,315
2	\$1,140	\$13,690	2	\$1,711	\$20,535
3	\$1,430	\$17,170	3	\$2,146	\$25,755
4	\$1,720	\$20,650	4	\$2,581	\$30,975
5	\$2,010	\$24,130	5	\$3,016	\$36,195
6	\$2,300	\$27,610	6	\$3,451	\$41,415
7	\$2,590	\$31,090	7	\$3,886	\$46,635
8	\$2,880	\$34,570	8	\$4,321	\$51,855

### Calculating Poverty Percentages

Divide the total monthly income by the total monthly income allowed according to family size that appears on the 100% 2007 HHS Poverty Guidelines Table.

Example: Total monthly income for a two person household is \$1,400.

100% Table for two people is \$1,140 (monthly)

\$1,400 divided by \$1,140 = 122%

☐ Under 75% ☐ 75% - 100% ☐ 101% - 125%  
☐ 126% - 150% ☐ Over 150%

Applicant Referred? ☐ No ☐ Yes

Type Referral: \_\_\_\_\_

Agency Name: \_\_\_\_\_

	Direct Assistance	ECIP
Current Month's Energy Bill:	\$	\$
Direct Assistance	\$130	
Child Age 5 or less: \$20	\$	
Energy Burden: \$25	\$	
Elderly Age 60+: \$20	\$	
Disabled: \$20	\$	
Income - 100% or less: \$25	\$	
Heater/HVAC repair/replacement:		\$
TOTAL	\$	\$

☐ Heater ☐ Air Conditioner ☐ HVAC ☐ Blanket

Vendor: \_\_\_\_\_

Vendor Date: \_\_\_\_\_

Amount: \_\_\_\_\_

Install Vendor: \_\_\_\_\_

Voucher Date: \_\_\_\_\_

Amount: \_\_\_\_\_

Utility Vendor: \_\_\_\_\_

Vendor Address: \_\_\_\_\_

Voucher Date: \_\_\_\_\_

Vendor#: \_\_\_\_\_

Account#: \_\_\_\_\_

Amount: \_\_\_\_\_

Comments:



CASE MANAGEMENT FORM

HEAD OF HOUSEHOLD

**CURRENT STATUS:** ☐ In Crisis ☐ Vulnerable ☐ Stable ☐ Safe ☐ Thriving


**Date:** \_\_\_\_\_ **Case Worker:** \_\_\_\_\_

**CURRENT STATUS:**    ☐ In Crisis    ☐ Vulnerable    ☐ Stable    ☐ Safe    ☐ Thriving

CANDID

**DATE:** \_\_\_\_\_ **CASE WORKER:** \_\_\_\_\_

**CURRENT STATUS:** ☐ In Crisis ☐ Vulnerable ☐ Stable ☐ Safe ☐ Thriving


**Date:** \_\_\_\_\_ **Case Worker:** \_\_\_\_\_

**CURRENT STATUS:**    ☐ In Crisis    ☐ Vulnerable    ☐ Stable    ☐ Safe    ☐ Thriving


Status after: ☐ In Crisis ☐ Vulnerable ☐ Stable ☐ Safe ☐ Thriving ☐ Follow-up

CASE MANAGEMENT FORM

FAMILY MEMBER FORM

**CURRENT STATUS:** ☐ In Crisis ☐ Vulnerable ☐ Stable ☐ Safe ☐ Thriving


**Date:** \_\_\_\_\_ **Case Worker:** \_\_\_\_\_

**CURRENT STATUS:**    ☐ In Crisis    ☐ Vulnerable    ☐ Stable    ☐ Safe    ☐ Thriving

**Status after:** ☐ In Crisis ☐ Vulnerable ☐ Stable ☐ Safe ☐ Thriving ☐ Follow-up

**Date:** \_\_\_\_\_ **Case Worker:** \_\_\_\_\_

**CURRENT STATUS:** ☐ In Crisis ☐ Vulnerable ☐ Stable ☐ Safe ☐ Thriving

<b>Status after:</b> <input type="checkbox"/> In Crisis <input type="checkbox"/> Vulnerable <input type="checkbox"/> Stable <input type="checkbox"/> Safe <input type="checkbox"/> Thriving <input type="checkbox"/> Follow-up

**Date:** \_\_\_\_\_ **Case Worker:** \_\_\_\_\_

**CURRENT STATUS:**    ☐ In Crisis    ☐ Vulnerable    ☐ Stable    ☐ Safe    ☐ Thriving

<b>Status after:</b> <input type="checkbox"/> In Crisis <input type="checkbox"/> Vulnerable <input type="checkbox"/> Stable <input type="checkbox"/> Safe <input type="checkbox"/> Thriving <input type="checkbox"/> Follow-up

OEO Form 1C-2 rev May, 2007

CASE MANAGEMENT FORM	CONTINUATION SHEET
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## 2008 LIHEAP PROGRAM STATUS REPORT

ENERGY ASSISTANCE COMPONENTS	Total Number of Assisted Households	*2007 Household Poverty Level Using Gross Income and Household Size					At Least One Member Who Is				
		under 75% poverty	75%-100% poverty	101%-125% poverty	126%-150% poverty	over 150% poverty	60 Years or Older	Disabled	Age 5 Years and Under	Age 3 Years Through 5 Years	Age 2 Years or Under
DA Heating	0										
DA Cooling	0										
ECIP Heating	0										
ECIP Cooling	0										

All households that requested assistance that were served and denied

ENERGY ASSISTANCE COMPONENTS	Total Number of Assisted Households	under 75% poverty	75%-100% poverty	101%-125% poverty	126%-150% poverty	over 150% poverty
DA Heating	0					
DA Cooling	0					
ECIP Heating	0					
ECIP Cooling	0					

Funds Obligated in the Month	
Direct Assistance	\$0.00
ECIP	\$0.00
Monthly Total	\$0.00

\*The 2008 Federal Poverty Guidelines will be issued as soon as the information is published and available in the 2008 Federal Register (approximately mid-March). Until then, continue to use the 2007 FPG.



# State of South Carolina

## Office of the Governor

MARK SANFORD  
GOVERNOR

OFFICE OF EXECUTIVE  
POLICY AND PROGRAMS

Appendix G

### **FISCAL/ TECHNICAL ASSISTANCE MEMORANDUM F 08- 01 (Revised)**

**TO:** See Distribution  
**FROM:** Jeanine S McCall  
Senior Manager for Audits  
**DATE:** November 29, 2006  
**RE:** Single Audit Review and Appeals Procedures for Nonprofit Organizations

This memorandum supersedes previously issued OEO Technical Assistance Memo F 08-01 (Revised), dated July 12, 2006.

### **PURPOSE**

The purpose of this memorandum is to set forth standards for obtaining consistency and uniformity among entities expending federal awards and to permit a thorough and fair review of audit questions and disallowances. The OEO shall revise these procedures as needed in order to maintain compliance with state and federal requirements.

The following regulations are federal audit requirements for grant agreements with the Office of Economic Opportunity:

1. Human Services Reauthorization Act of 1984, Public Law 98-558.
2. OMB Circular A-133, Audits of States, Local Governments, and Non-Profit Organizations (Issued pursuant to the Single Audit Act of 1984, Public Law 98-502 and the Single Audit Act Amendments of 1996, Public Law 104-156).
3. OMB Circular A-110, Uniform Administrative Requirements for Grants and Other Agreements with Institutions of Higher Education, Hospitals, and Other Non-Profit Organizations.
4. OMB Circular A-129, Policy for Federal Credit Programs and Non-Tax Receivables, Part V Delinquent Debt Collection.
5. OMB Circular A-122, Cost Principles for Non-Profit Organizations.

### **SINGLE AUDIT**

#### **1. Definition**

An audit of federal awards as described in OMB Circular A-133 which includes the subgrantee's financial statements and required schedules related to Federal awards.

#### **2. Audit Requirements § .200**

Subgrantees that expend (§ .205) \$500,000 or more in a fiscal year in federal awards shall

have a single audit conducted for that year in accordance with the provisions of this part.

Refer to § 500-515 for requirements for audit scope, audit report and reporting audit findings.  
Refer to § 520-530 for major program, program risk and low auditee criteria.

### **3. Sanctions § .225**

When a subgrantee demonstrates a continued inability or unwillingness to have an audit conducted in accordance with these standards, OEO will institute appropriate sanctions which could include, but are not limited to, withholding future federal awards, disallowing overhead costs, suspending or terminating federal awards until the audit is completed and submitted.

### **4. Audit Costs § .230**

Professional fees associated with audits are allowable charges if made in compliance with OMB Circular A-133 and may be allocated as indirect cost. Generally, the percentage of costs charged shall not exceed the percentage derived by dividing OEO program funds by total federal funds expended by the subgrantee during the agency's fiscal year under audit.

### **SELECTION OF AUDITORS § .305**

When procuring audit services, the subgrantee shall use the guidelines provided in OEO Technical Assistance Memorandum F 02-01 (Procurement Procedures). Each Request for Proposal for audit services shall be for a period not to exceed three (3) consecutive fiscal years. At a minimum, procurement of audit services shall include advertisement of the Request for Proposal in the South Carolina Business Opportunities newsletter, published by the State Budget and Control Board, and the newsletter of the South Carolina Association of Certified Public Accountants.

When requesting proposals for audit services, the objective and scope of the audit should be made clear. Submitted proposals should include a copy of the firm and partner current licensure and a copy of the most recent peer review. Licenses can be verified by the State Board of Accountancy.

Factors to consider in evaluating each proposal include responsiveness to the proposal, inclusion of license and peer review report, relevant experience, staff professional qualifications, technical abilities, and price. Whenever possible, the subgrantee is encouraged to make positive efforts to utilize small businesses, minority-owned firms, and women's business enterprises (OMB Circular A-133).

In line with the Sarbanes-Oxley Act of 2002 Sec. 203, an incumbent auditor can submit bids for consecutive subsequent periods; however, the lead auditor or audit partner responsible for reviewing the audit may provide such services for no more than five (5) consecutive fiscal years. After such time, a new lead auditor or audit partner shall be appointed.

### **INDEPENDENT AUDIT REPORT SUBMISSION § .320**

The independent audit shall be completed and submitted within the earlier of 30 days after receipt of the auditor's report(s), or nine months after the end of the subgrantee's fiscal year-end.

Within thirty (30) days of receipt of the independent audit report, the subgrantee must provide OEO:

- Two (2) copies of the Independent Audit Report; one original and one photo copy
- An explanation for differences between amounts reported on the FSR and amounts reported on the audit schedules
- Any necessary supporting documents
- Any other information that may be pertinent to the grant(s) under audit

The subgrantee will forward at least one (1) copy of the independent audit report to each funding source represented in the report, exclusive of OEO's required copies.

The audit report submission is to include the elements outlined in OMB Circular A-133 for financial statements, report submission, audit scope, audit reporting and audit findings and is to include the following:

**1. Data Collection Form or statement (as required in § .320(b))**

A copy of the form may be found at <http://harvester.census.gov/gac/collect/formoptions.html>. or a statement containing the following information:

- a. agency name, employer ID #, name, title and phone number of certifying official
- b. audit firm or auditor name, address, phone number, name and title of lead auditor and audit partner
- c. list of Federal awarding agencies who will receive copies of reporting package
- d. yes or no statement pertaining to the types of compliance requirements listed in § .320(b)

**2. Reporting Package as required in § .320(c)**

a. Financial Statements as required in § .310(a)

b. Schedule of Expenditures as required in § .310(b) and is to:

- include either on the schedule of expenditures or schedule of Federal awards a note describing significant accounting policies used in schedule preparation
- identify program year and or effective period and OEO approved budget and related under/over budget per program year on the schedule of expenditures

c. Audit Reporting as required in § .505 is to ensure:

1. the Independent Auditor's Reports, with respect to major programs, includes:
  - a. an opinion (or disclaimer of opinion) on financial statements
  - b. a statement on compliance and internal controls over financial reporting based on the audit of financial statements
  - c. an opinion (or disclaimer of opinion) on compliance with laws, regulations, contracts and grant agreements and a statement on audit results on internal controls
2. the Schedule of Findings and Questioned Costs as required in § .505(d) contains:
  - a. the Summary of Audit Results identifying
    - the Catalog of Federal Domestic Assistance (CFDA) number for major programs
    - why an auditee does not qualify as low-risk, if applicable
  - b. Financial Statement Findings and Finding and Questioned Costs for Major Programs contain an auditor recommendation and agency response per finding
3. the Summary of Schedule of Prior Audit Findings as required in § .315(b) includes either:
  - a. corrective action taken § .315(c)
  - b. planned corrective action and partial action taken or
  - c. an explanation if corrective action differs significantly from original action plan

**OEO AUDIT RESPONSIBILITIES § .400(d)**

OEO is to ensure that federal awards are used for authorized purposes and in compliance with the laws and regulations governing the provisions of each grant agreement, that the subgrantee has satisfactorily

met the fiscal year-end audit requirements and that the subgrantee takes appropriate and timely corrective action. OEO will follow up on prior year's audit findings and issue a desk audit report.

### **OEO DESK AUDIT**

The desk audit consist of a review of the single audit to determine audit acceptability, to ascertain agency compliance, to examine questioned costs and findings reported in the independent audit report, to determine grant agreement violations not reported in the independent audit report and to determine any fund balances due OEO.

Audit acceptability will be determined by compliance with the OMB Circulars, Government Auditing Standards, generally accepted auditing standards, generally accepted accounting principles, and laws, regulations, contracts and grant agreements.

The single audit review will be conducted within six (6) months following receipt of the subgrantee's independent audit report. The desk audit will include an analysis of program activity with a separate analysis for indirect cost. Program variances will address completed program years while partial year program variances considered material will be subject to sampling. Indirect cost analysis will be performed after receipt of the single audit and the corresponding indirect cost rate agreement for the year(s) audited.

The desk audit report will describe and provide justification for each audit finding, questioned cost and area of concern. The report will identify whether each questioned cost is an allowed or disallowed cost, the amount of funds involved, if any, and the total sum in question for each OEO program.

OEO will address reports and follow up correspondence to the Executive Director unless otherwise requested by the subgrantee's Board. The preliminary Desk Audit Report and Indirect Cost Analysis affords the Executive Director an opportunity to address matters prior to completion of the initial report. The subgrantee shall provide a written response to the preliminary report to OEO Audit within thirty (30) days of the date of the report, unless otherwise stated, and shall respond to the initial report as indicated.

Failure to respond the preliminary or initial report within the required time frame will be interpreted as agency agreement with the report's findings. If the subgrantee fails to respond to follow-up correspondence within the requested time frame, this will also be interpreted as agency agreement and correspondence indicating non response will be sent to the Board Chairperson. The agency's failure to respond may result in a suspension of future funding.

### **PAYMENT OF DISALLOWED COSTS**

Disallowed costs shall be payable to the OEO within forty-five (45) days from the date of the correspondence identifying disallowed costs. Payment methods permitted to satisfy disallowed costs are as follows:

#### **1. Lump-sum Payment**

The OEO must receive the total disallowed sum within the aforementioned time period. If the subgrantee is financially unable to make full payment within this time frame, this fact must be stated to the OEO Senior Auditor in writing within twenty (20) business



days of the date of the correspondence identifying disallowed costs. The subgrantee will be subject to an OEO audit to document the non-federal/non-state funds available for repayment of delinquent debt.

## **2. Installment Payments**

Subsequent to verification of the subgrantee's inability to repay in lump-sum, OEO will establish a written agreement binding the subgrantee to the terms and methods outlined. The standard repayment period is twelve months, not to exceed a thirty-six month maximum time allowance. Monthly payments will be due OEO by the 15<sup>th</sup> of each month. Quarterly payments will be due OEO by the 15<sup>th</sup> day of the last month in the quarter.

## **3. Delinquent Payments**

If a subgrantee fails to repay funds within the required time frame, the regulations mandated by OMB Circular A-129, Policies for Federal Credit Programs and Non-Tax Receivables, Part V-Delinquent Debt Collection and 4 CFR Chapter 11-Federal Claims Collection Standards (General Accounting Office – Department of Justice) may be exercised in the collection of delinquent debt.

If you have any questions, you may contact me at (803) 734-0691.

### **DISTRIBUTION:**

**CAA Board Chairpersons**

**CAA Executive Directors**

**CAA Program Directors**

**CAA Fiscal Officers**

**OEO Director**

# LIHEAP FILE WORKSHEET

**AGENCY:** \_\_\_\_\_ **MONITORING DATES:** \_\_\_\_\_

Applicant: \_\_\_\_\_ Family I.D. \_\_\_\_\_ HB Yes ☐ No ☐

Application date: \_\_\_\_\_ County: \_\_\_\_\_

1. FPL \_\_\_\_\_ % HH# \_\_\_\_\_ Annual Income \$ \_\_\_\_\_

2. Application completed, signed and dated by applicant and staff: Yes ☐ No ☐

3. File contains picture I.D. and social security cards: Yes ☐ No ☐ Other: (specify) \_\_\_\_\_

4. Income (calculate): ☐ employed ☐ unemployed (UI, TANF, SSA, SSI) ☐ disabled ☐ elderly

5. Validation of referrals: Yes ☐ No ☐ **Type of Referral:** \_\_\_\_\_

6. Validation of energy conservation material: Yes ☐ No ☐

7. Copy of energy bill in file: Yes ☐ No ☐ different name & address on bill: Yes ☐ No ☐  
file documented: yes ☐ no ☐ n/a ☐

## VOUCHER

ECIP \$ \_\_\_\_\_ D/A \$ \_\_\_\_\_ P/S \$ \_\_\_\_\_ Heater \$ \_\_\_\_\_  
A/C \$ \_\_\_\_\_ Heat Pump \$ \_\_\_\_\_ Blanket \$ \_\_\_\_\_ HVAC Repair \$ \_\_\_\_\_

## DIRECT ASSISTANCE

**Min DA benefit** **\$130**

Calculation: Monthly Income x 20%

Child Age 5 or < ☐ \$20 \_\_\_\_\_

Energy Burden ☐ \$25 \_\_\_\_\_

Elderly, Age 60 ☐ \$20 \_\_\_\_\_

Disabled ☐ \$20 \_\_\_\_\_

Income <100% ☐ \$25 \_\_\_\_\_

Current energy bill \$ \_\_\_\_\_

**Total DA = \$**

**SC ROMA DA \$**

## ECIP

1. Proof of Emergency: Yes ☐ No ☐ Type: \_\_\_\_\_

2. Amount of bill: **current**\$ \_\_\_\_\_ + **past due**\$ \_\_\_\_\_ = **total** \$ \_\_\_\_\_

3. Did agency pay the entire past due amount: Yes ☐ No ☐ If no, balance \$ \_\_\_\_\_

**Collaborative efforts for balance:**

4. Emergency pledge w/in 48 hrs: Yes ☐ No ☐ Life threatening pledge w/in 18 hrs: Yes ☐ No ☐

revised 05/07

**GOVERNOR'S OFFICE OF ECONOMIC OPPORTUNITY (OEO)**  
**LOW-INCOME HOME ENERGY ASSISTANCE PROGRAM (LIHEAP)**  
**Monitoring Instrument**

**Agency:** \_\_\_\_\_ **Executive Director:** \_\_\_\_\_

**LIHEAP Director:** \_\_\_\_\_ **OEO Coordinator:** \_\_\_\_\_

**Monitoring Review Dates:** \_\_\_\_\_ **Period Reviewed:** \_\_\_\_\_

1. Outstanding program or fiscal reporting issues for the prior year? Be specific using Program Status Reports (PSR), and Financial Status Reports (FSR).
2. Program advertising complies with the approved Work Plan for the current year? Review Control File and Work Plan.
3. Vendor agreements on file, current and properly executed? Review control file.
4. Vendor payment logs comply with 30-day requirement? Review payment logs or sample from client logs.
5. Appeal and Fair Hearing Policy posted at each intake site? Look for at intake areas and main lobby. Ask if any appeals were filed or hearings were conducted? Ask to review the control file.
6. Ensure that the basic program operations comply with the approved Work Plan for the current year? (e.g. locations, hours of operation, services for the homebound)
7. Does staff appear knowledgeable of the current Work Plan objectives? Are copies of state plan, Administrative Guide and agency Work Plan on hand?

Concerns/recommendations/training issues:

8. Client logs readily available, up-to-date, complete and balance current?

YTD Obligated: \$ \_\_\_\_\_

YTD Expended: \$ \_\_\_\_\_

Concerns:

**GOVERNOR'S OFFICE OF ECONOMIC OPPORTUNITY (OEO)**  
**LOW-INCOME HOME ENERGY ASSISTANCE PROGRAM (LIHEAP)**  
**Monitoring Instrument**

9. Review PSRs and/or agency logs - Is the agency tracking households that have members who are elderly, disabled, or young children age 5 or younger? Is the number of households and income levels (served and denied) being tracked on the PSR?
10. Expenditures/files reflect equitable availability of LIHEAP program in agency service area, by counties? (Sample payment logs for each county to get a general idea)
11. Basic client file review - Serving target populations? General observations – applications complete? Appropriate signatures? File documents complete and in order? Referrals? Using the current OEO application? Using SC ROMA for live intake?

Corrective action(s) taken on site (by who) to eliminate what problem(s)

Findings – Support with appropriate documentation attached with your report.

12. Energy Education - General evidence noted in client files? Evidence of energy education classes? Is there evidence of income management or referrals?

General evidence noted in public waiting area or at intake desk sites?

General recommendations in this area for agency: web sites, videos, brochures from vendors, use vendors to help provide classes and/or materials. Emphasize benefit of partnering with Weatherization.

Be specific about what agency needs to improve in this area.

13. Any equipment, property or vehicles purchased with LIHEAP funds readily available for inspection, to include travel logs and current registration/tags.

**GOVERNOR'S OFFICE OF ECONOMIC OPPORTUNITY (OEO)**  
**LOW-INCOME HOME ENERGY ASSISTANCE PROGRAM (LIHEAP)**  
**Monitoring Instrument**

14. Any equipment, property or vehicles purchased with LIHEAP funds that need to be surplusd?  
Be sure to advise agency on how to handle properly. (OEO Fiscal Memo)
  
15. # heaters purchased \_\_\_\_\_ # air conditions purchased: \_\_\_\_\_
  
16. Agency response to visit?
  
17. General conclusions?

Rev. 04/2007

**LIHEAP 2008 WORK PLAN**  
**(Must be submitted with the Application Budget by August 31, 2007)**

**SUBGRANTEE IDENTIFICATION**

**Agency:**

**Date Submitted:**

**Project Name:** Low-Income Home Energy Assistance Program (LIHEAP)

**Project Period:** January 1, 2008 through December 31, 2008

**LIHEAP Funds Requested:** \$

**Other Funds:** \$

**Source:**

**Total Project Funds:** \$

**PLAN FOR MAXIMIZING**

**Step I –Program Outcomes and Objectives**  
**Counties:**

**Assurance of Target Households (Sec. 2605(b)(5)):**

The agency must assure that the highest level of assistance goes to households with the lowest incomes and highest energy costs in relation to income, taking into account family size. Additional targets are those households with members who are especially vulnerable, including the elderly, disabled and those with children age 5 or younger.

**Total households projected to be served with LIHEAP funds in 2008:**\_\_\_\_\_

**Project Outcome Statement:**

A statement that defines the end result sought, stated in household terms.

## LIHEAP 2008 WORK PLAN

**Performance Target Outcome:** The performance target will define success for the program in terms of what households will actually achieve. The Performance Target Outcome will state the number or percentage of households entering the program that will achieve the performance target(s). What is “success” for the project? *Examples:* How many households will you work with this year and how many will significantly change behavior, condition or status? How many *new* households will you target this year? How many *elderly* households will you serve this year? How many *new homebound* households will you serve this year? What percentage of households will you target for *case management*? What percentage of high energy use households will you target for *referral to Weatherization*?

**“Of the X number of households served, Y number of households will achieve.”** Outcomes should correspond with the goals outlined in the State Work Plan.

**Step II – Approach and Strategies: (Methodology)** Respond in narrative.

**Outreach (42 USC 8624(b)(1))** Describe the frequency and specific mediums for advertising the availability of LIHEAP funds that will reach vulnerable and diverse households within the entire service area. Agency control file must validate.

## LIHEAP 2008 WORK PLAN

Describe the agency's operational plan for intake; provide actual street address locations, hours of operation and number of staffing at each intake site.

**Homebound and Disabled Households:** Describe the agency's application process for Direct Assistance (DA) for homebound and disabled households. Explain how the agency ensures *new* homebound and disabled applicants are served each year.

**Training:** Describe how and when the agency will conduct training for intake staff on the performance targets outlined in this Work Plan.



**LIHEAP 2008 WORK PLAN**

**Appeal and Fair Hearings Procedure (Sec. 2605(b)(13)):** Specify the location/posting and availability of the Appeal and Fair Hearing Procedure at the main office and at each in-take location.

**Applicant Education ((Sec. 2605(b)(5) and (42 USC 8624(b)(2)):** Describe the manner in which agency employees will educate applicants on the statutory purposes of the LIHEAP Program.

**Program Eligibility Determination & Timely Provision of Direct Assistance:**  
Describe the time frame for approving and for notifying Direct Assistance applicants.

**LIHEAP 2008 WORK PLAN**

**Emergency Crisis Intervention Program (ECIP) (Sec. 2605(c)(3)(A)):** ECIP applications are to be accepted at sites that are geographically accessible to all households within the service area). The agency must provide either the means for ECIP applications to be provided to individuals who are physically infirmed; or the means to travel to the agency intake sites (Sec. 2605(c)(3)(B)(i)(ii); explain the agency's intake process for complying with this requirement:

**Emergency Crisis Prevention (ECIP) – General Emergencies (Sec. 2604(c)(a)(1)):** Explain the agency's method for resolving general energy-related emergencies *within 48 hours*.

**Air Conditioners and/or HVAC System Repair/Replacement:** Describe in detail the agency's method for ensuring proper installation and client education for new air conditioners and or HVAC system repair and/or replacement.

## LIHEAP 2008 WORK PLAN

**Emergency Crisis Prevention (ECIP) – Life Threatening Emergencies (Sec. 2604(c)(a)(2)):** Explain the agency's method for resolving life-threatening energy-related emergencies *within 18 hours*.

**ECIP:** Describe the agency's method and time frame for notifying non-eligible ECIP households.

**LIHEAP 2008 WORK PLAN**

Describe the agency's method for working with a household that routinely (year after year) does not pay energy bills on time in order to obtain an ECIP payment (42 USC 8624(b)(16)).

Describe the agency's system of checks and balances between the Fiscal Department and program staff to assure LIHEAP funds will not be over-expended and that carryover will not exceed 10% of allocated funds.

Describe the method by which the agency informs applicants that energy funds are expended and provides the applicant referrals to other available services and programs. The method described should prohibit the staff from simply cutting applicants off during a phone call and from posting "Out of Funds" on the door. The methodology should encourage the use of referrals and other agency services and area resources.

## LIHEAP 2008 WORK PLAN

### **Energy Need Reduction Services - Energy Counseling**

Describe the agency's method(s) by which Promising Practices will be tracked, identified and shared; those practices which reduce and/or eliminate consumer high energy consumption and dependency on LIHEAP assistance. Applicant files must validate.

Describe how/if the agency intends to implement an income and/or case management component. Applicant files must validate.

**LIHEAP 2008 WORK PLAN**

**Weatherization (42 USC 8624(b)(1) and (c)(1)(D)):** Describe how the agency will encourage/refer LIHEAP applicants to apply for Weatherization Assistance. Applicant files must validate.

Identify practices associated with LIHEAP that will provide follow-up or a continuum of care for households facing multiple hardships. Applicant files must validate.

Describe the agency's energy education program and how it will be implemented toward high energy use and high energy burden households and monitored for improved energy consumption. Describe the agency's method for assuring staff efforts in this area with customers. Applicant files must validate staff efforts in this area. (Enclose samples of materials)

**LIHEAP 2008 WORK PLAN**  
**PY 2007 LIHEAP ASSESSMENT**  
**(Not optional – Must be completed)**

This portion of the Work Plan is for the purpose of evaluating the agency's 2007 successes and identifying areas that need improvement for PY 2008.

**Outreach:** Outreach efforts in the coming year for LIHEAP need to be strengthened as follows:

**Applications:** Application efforts in the coming year need to be restructured and/or strengthened as follows:

**Collaborations/Partners:** Applicants were often referred to us from the following agencies and organizations:

**Referrals:** When funds were exhausted, we referred applicants to the following sources:

**PY 2007 LIHEAP ASSESSMENT**  
**(Not optional – Must be completed)**

**2007 Program Restructuring:** The following changes were incorporated during the year in order to accomplish the agency's 2007 Performance Targets:

**Areas Needing Improvement:** Describe aspects of the 2007 program that were least effective, why they were least effective and how they will be improved:

**Best Practices:** Describe the aspects of the 2007 program that were most successful in serving eligible applicants and how they were successful:

**Additional Partnerships/Resources for FY 2008:** This year, the following additional partnerships and resources will be sought in order to expand/enhance agency outreach and outcomes:



**PY 2007 LIHEAP ASSESSMENT**  
**(Not optional – Must be completed)**

**Recommendations (for OEO consideration):** To improve our processes and outcomes, could the following policy(ies) and/or procedure(s) be implemented or changed for the LIHEAP Program (each is to be followed by a brief justification and explanation of what would improve the program's results).

## SOUTH CAROLINA LOW-INCOME HOME ENERGY ASSISTANCE PROGRAM VENDOR AGREEMENT

This Vendor Agreement shall govern certain activities of the Low-Income Home Energy Assistance Program, hereinafter referred to as LIHEAP, which are to be carried out by the Vendor identified on the signature page of this Agreement, hereinafter referred to as the Vendor, as a condition of receipt of payment, and the Community Action Agency; hereinafter referred to as the CAA.

The \_\_\_\_\_ and the Vendor agree to the following.  
**(Community Action Agency)**

### **A. SERVICES TO BE PERFORMED**

1. The Vendor is required to verify the name, account holder's name, account number, current balance on account and signature upon receipt of the energy voucher prior to crediting the customer's account.
2. The Vendor will accept the voucher(s) as credit for actual commitment/cash payment for the purchase of home heating fuel or cooling assistance. The Vendor shall specify on the signature page of this Agreement the fuel type to be provided. The Vendor will accept vouchers for the purchase of only the type fuel approved in this Agreement.
3. The Vendor will only deliver fuel to the actual residence of the account holder or credit the account of the account holder as documented on the voucher.
4. If the customer has moved and the energy voucher does not reflect the new address, the Vendor shall not accept the voucher until the customer returns the voucher and requests a change of address from the Community Action Agency (CAA).
5. Vendors are to ensure credit and/or service to approved households within the designated program year.
6. This assistance is provided for households, not individuals. For this reason, no name changes may be made on the energy voucher. If the name that appears on the voucher is other than that shown on the Vendor records, the Vendor shall be concerned only with the address. No alterations of any kind should be made to the voucher.
7. LIHEAP assistance may be used for deposits if specified by the CAA.

### **B. PROVISIONS UNDER WHICH PAYMENT WILL BE MADE TO VENDORS**

1. The Vendor must return this properly executed Vendor Agreement to the CAA prior to being reimbursed.
2. The Vendor must provide a Federal Employer Identification Number (FEIN) or a Social Security number will be acceptable only if the Vendor is an individual and has no FEIN.
  - a. If a Vendor provides a Social Security Number, the Vendor must use the proprietor's name, not the company name. If a FEIN is supplied, a company name must be used.

**SOUTH CAROLINA LOW-INCOME HOME ENERGY ASSISTANCE PROGRAM  
VENDOR AGREEMENT**

- b. The Vendor shall notify the CAA in writing immediately when the FEIN, Social Security number, business name and/or address changes. Failure to report changes may result in a delay or payments. An IRS W-9 must accompany changes.
- 3. The Vendor shall provide the eligible customer a quantity of fuel equivalent to the value of the energy voucher submitted (including cords of wood).

- a. If the value of the quantity of fuel purchased by a customer is less than the value of the energy voucher, the Vendor shall credit the difference to the customer's account. The credit balance on account must be expended by the end of the program year or returned to the CAA.

If the value of the quantity of fuel required/purchased by a customer is greater than the energy voucher amount, payment for the remaining balance due must be negotiated between the customer and the Vendor. The CAA will not intervene in these matters.

- b. **The Vendor will not exchange a customer's energy voucher for cash nor will any cash equivalent be given for excess credit.** Violations shall be treated in accordance with Federal and State statutes.
- c. When a customer moves from the Vendor's service area, or becomes deceased, and a credit balance remains on that account, the following policies shall apply within the current program year:
  - i. Any legal survivors living in the residence of the deceased customer, who were household residents at the time of application, are entitled to use the remaining benefit.
  - ii. If there are no remaining legal survivors within the household, any remaining credit balance shall be refunded to the CAA within the current program year.
  - iii. Credit balances not used during the current program year are to be returned to the CAA.
  - iv. Any other circumstances arising shall be dealt with on a case-by-case basis. The Vendor should contact the CAA for additional instruction.

**C. PAYMENT PROCEDURES**

- 1. Once the Vendor has honored the energy voucher, as specified herein, the Vendor shall mail the energy voucher(s) to the CAA for payment.

**SOUTH CAROLINA LOW-INCOME HOME ENERGY ASSISTANCE PROGRAM  
VENDOR AGREEMENT**

2. Within 30 days of the date of the receipt of the energy voucher(s), payment amount equal to the total amount of the energy voucher(s) received by the CAA will be made to the Vendor.

If a Vendor has not received payment for the energy voucher(s) within 30 days following the submission, the Vendor should contact the CAA and report the delay. In instances of reported delays, the Vendor may also contact the Governor's Office, Office of Economic Opportunity.

3. CAAs will submit an IRS Form 1099 to record payments in excess of \$600 to non-incorporated vendors.

All properly executed Vendor Agreements must be maintained on file with the CAA.

**D. MONITORING**

1. The Vendor will maintain records documenting the amount of energy assistance that the customer received and the date of receipt for all fuels other than electricity and natural gas. Records are to be maintained for one year after the program year ends.
2. The Vendor shall permit access to records pertaining to the activities engaged in by the Vendor under this Agreement. Such records include energy voucher payment forms or other documents supporting the delivery of services or receipt of payments for services rendered by the Vendor, as well as the amount of sale, customers' names and addresses.
3. The Vendor will cooperate with any Federal, State or local investigation, audit or program review.

**E. AMENDMENTS**

No amendment or modification of this Agreement shall be binding unless in writing and signed by both parties hereto.

**F. TERMINATION**

1. Either the CAA or the Vendor may terminate this Agreement by giving the other party at least 30 days written notice.
2. This Agreement will terminate immediately should the Vendor supply false information or attempt to defraud the CAA or the eligible customer. In such cases, no additional reimbursement will be made to the Vendor until such matter is resolved.

In witness hereto, the CAA and the Vendor have executed this Agreement on this \_\_\_\_\_ day of \_\_\_\_\_.

## SOUTH CAROLINA LOW-INCOME HOME ENERGY ASSISTANCE PROGRAM VENDOR AGREEMENT

**VENDOR: Complete Section 1-9. Do not leave anything blank.**

1. \_\_\_\_\_  
(Business or Vendor Name)

2. \_\_\_\_\_  
(Mailing Address – Include City, State and Zip Code)

3. \_\_\_\_\_  
(Street Address – Include City, State and Zip Code)

4. \_\_\_\_\_  
(Area Code and Telephone Number)

5. **VENDOR DOCUMENTATION**

The Vendor must provide a Federal Employment Identification Number (FEIN), or, if you do not have a FEIN, a Social Security number (SSN) will be acceptable only if used with the proprietor's name (e.g. Hallman's Wood – (FEIN) or Mark Hallman (SSN).

Federal Employer Identification Number \_\_\_\_\_

Or

Social Security Number \_\_\_\_\_

6. **Fuel Type – Circle all Types of Fuel Provided.**

Fuel Oil	Electricity
Kerosene	Wood
Propane Gas	Coal
Natural Gas	Landlord or Building Operator
	Who Provides Heat to Tenants

7. **Check all that apply:**

- ☐ I certify that I am not subject to backup withholding.
- ☐ I certify that the mailing address on file is correct and current.
- ☐ A W-9 is enclosed as required for new vendor(s), or for existing vendors to report change of address or change in FEIN or Social Security number and/or business name.

8. \_\_\_\_\_  
(Print Authorizing Signature)                      (Witness)

9. \_\_\_\_\_  
(Authorizing Signature)

## FY 2008 LIHEAP Work Plan Statistical Sheet

**Agency:**\_\_\_\_\_

Date: Appendix K

## Appendix K

## Elderly

[illegible]

**Disabled**

[illegible]**Households w/Children 5 Years and Under**[illegible]

## High Energy Burden

County	2007 Number Served	2008 Targets
0		
0		
0		
0		
0		
0		
0		
	0	0

**DISTRIBUTION**

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U.S. Department of Health & Human Services	2
South Carolina Community Action Agencies	
Board Chairpersons	15
Executive Directors	15
Fiscal Officers	15
LIHEAP Program Directors	15
South Carolina State Library	3
South Carolina Association of CAP	1
<u>OEO Staff</u>	<u>15</u>
Total	81

*The 2008 LIHEAP STATE PLAN is available on [www.oepp.sc.gov/oeo/](http://www.oepp.sc.gov/oeo/).*